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ABSTRACT

This combination curriculum and workbook, which was originally developed for use in a training workshop, is intended to assist adult educators in learning to market their adult literacy programs. The first chapter reviews basic marketing concepts (the definition of marketing, 10 truths about marketing, marketing versus promotion, steps in marketing, learners as customers, and the importance of using every opportunity for marketing). Chapter 2 introduces guidelines for using the following new technologies in a campaign to market an adult literacy program: video and audio (preproduction, scripts and storyboards, production tips, postproduction editing, tips to improve videographics, a sample plan for a video, equipment needed to make a video, and important terms related to video and audio); computers (databases, the basics of a computer system, and important computer terms); and direct mail (steps in direct marketing, development of a direct mail campaign, tips for direct mail, suggestions for artwork and printing, postal rates and regulations, and terms related to direct mail and printing). Identifiying and marketing to other target agencies are covered next. Chapter 4 deals with commitment and retention. Six marketing case studies are presented in Chapter 5. The next chapter explains the steps entailed in planning a marketing strategy. A bibliography lists sources dealing with marketing, video, computers, direct mail, and student retention. A workshop evaluation form concludes the guide. (MN)

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ED 290874

MARKETING II

WORKBOOK

CURRICULUM AND WORKBOOK
PREPARED BY CHERYL REEVES

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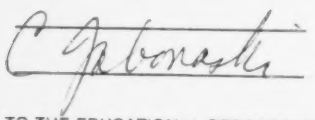

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Workshop Evaluation

MARKETING II

Day 1:

9:00 - 9:30	ACTIVITY 1: WHO ARE WE AND WHY ARE WE HERE?
9:30 - 10:15	ACTIVITY 2: REVIEW OF MARKETING CONCEPTS
	(Marketing Concepts - Review, pgs. 2-10)
10:15 - 10:30	**Break**
10:30 - 11:15	ACTIVITY 3: USE OF NEW TECHNOLOGIES IN MARKETING - VIDEO
	(Video and Audio, pgs. 12-30)
11:15 - 12:00	ACTIVITY 4: HOW CAN WE USE VIDEOS?
	(Worksheet A: Storyboard, pg. 18)
12:00 - 1:00	**Lunch**
1:00 - 1:30	ACTIVITY 5: VIDEO TIPS
1:30 - 2:00	ACTIVITY 6: USING THE COMPUTER IN MARKETING
	(Computers, pgs. 31-49)
2:00 - 2:45	ACTIVITY 7: HOW CAN I USE DIRECT MAIL IN MARKETING
	(Direct Mail, pgs. 50-68; Worksheet D: Planning a Direct Mail Campaign, pg. 55-56)
2:45 - 3:00	**Break**
3:00 - 3:30	ACTIVITY 8: MARKETING TO OTHER AGENCIES
3:30 - 4:00	ACTIVITY 9: IDENTIFYING YOUR TARGETS
	(Worksheet E: Marketing to Other Agencies, pg. 70; Worksheet F: Identifying Your Targets, pg. 71)
4:00 - 4:15	ACTIVITY 9: CLOSING

MARKETING II

Day 2:

9:00 - 9:30	ACTIVITY 1: CAN I TELL YOU WHERE I'M COMING FROM THIS MORNING?
9:30 - 10:30	ACTIVITY 2: PLANNING YOUR APPROACH **(Role Play - Marketing to DSS, pgs. 73-74)**
10:30 - 10:45	**Break**
10:45 - 11:15	ACTIVITY 3: RETENTION **(Commitment and Retention, pg. 76)**
11:15 - 12:30	ACTIVITY 4: PROBLEM-SOLVING ABOUT RETENTION **(Synectics, pgs. 77-78)**
12:30 - 1:30:	**Lunch**
1:30 - 3:00	ACTIVITY 5: MARKETING CASE STUDIES **(Marketing Case Studies, pgs. 80-81)**
3:00 - 3:15	**Break**
3:15 - 3:45	ACTIVITY 6: PLANNING A MARKETING ACTIVITY **(Worksheet G: Planning A Marketing Strategy, pgs. 83-85)**
3:45 - 4:15	ACTIVITY 7: CLOSING/EVALUATION

OBJECTIVES

MARKETING II

At the end of the training, participants should be able to:

- Explain the basic concepts of marketing, including the distinction between marketing and promotion.
- Plan a simple video production for use in marketing.
- List several ways that the computer might be used in marketing.
- List the general principles that might be used in planning a direct mail marketing campaign.
- Identify those other agencies which should be the primary targets of marketing about literacy programs and the strategies which would be most effective in reaching those agencies.
- List several steps that might be taken to increase retention of clients in literacy programs.

I. MARKETING CONCEPTS - REVIEW

MARKETING - DEFINITION *

MARKETING is the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets for the purpose of achieving organizational objectives. It relies heavily on designing the organization's offering in terms of the target markets' needs and desires, and on using effective pricing, communication, and distribution to inform, motivate, and service the markets.

There are several factors to note about this definition:

1. Marketing is a managerial process involving analysis, planning, implementation, and control.
2. Marketing involves carefully formulated programs, not just random actions to achieve desired responses.
3. Marketing seeks to bring about a voluntary exchanges of values by offering an attractive set of benefits for the target market.
4. Marketing means the selection of target markets rather than an attempt to serve every market and to be all things to all people.
5. The purpose of marketing is to help organizations ensure survival and continued health through serving their markets more effectively. This requires that an organization be very specific about its objectives.
6. Marketing relies on designing the organization's offering in terms of the target market's needs rather than in terms of the seller's personal tastes.
7. Marketing utilizes and blends a set of tools called the marketing mix --product design, pricing, communication, and distribution.

* adapted from Philip Kotler and Alan R. Andreasen, *Strategic Marketing for Nonprofit Organizations*

TEN TRUTHS ABOUT MARKETING *

1. Your market is constantly changing.

   When you stop marketing, you miss evolving opportunities and stop being part of the process.

2. People forget fast.

3. The competition for your market's resources (time, money, etc.) is always there.

   People will use their resources somewhere. If you don't make them aware that you are "selling" something, they'll use these resources elsewhere.

4. Marketing strengthens your identity.

   If you quit marketing, you shortchange your reputation, reliability, and the confidence people have in you.

5. Marketing is essential to survival and growth.

   With very few exceptions, people won't know you are there if you don't get the word out.

6. Marketing enables you to hold on to your old clients.

   When old clients don't hear from you or about you, they tend to forget you.

7. Marketing maintains morale.

   Your staff's morale is improved when they see marketing work.

8. Marketing gives you an advantage over others who have ceased marketing.

9. Marketing allows your service to continue operating.

10. You have invested money that you stand to lose.

    If you quit marketing, all of the time, energy, and money you have used for previous marketing becomes lost as the consumer awareness it purchased slowly dwindles away.

* adapted from Jay Conrad Levinson, *Guerilla Marketing*

MARKETING VERSUS PROMOTION *

It is important to remember that **MARKETING** is not just **PROMOTION.**

PROMOTION - the direct activities of "making a sale"

In adult education, for instance, promotion involves those direct activities that lead to enrollment--mailing a brochure, putting an advertisement in the paper, airing a PSA on the local radio station.

GOAL OF PROMOTION: More enrollment.

MARKETING - a broader term that includes how we interact with and meet our public's needs.

GOAL OF MARKETING: More positive perception of our organization.

* adapted from William A. Draves, *Marketing Techniques for Office Staff*

STEPS IN MARKETING *

Marketing for services such as literacy services involves the following steps:

1. Identify the marget segment

2. Assess their needs and desires - get to know them

3. Determine how your service(s) meet these needs and desires - "What's in it for me?"

   Remember that people buy benefits, not features.

4. Develop a marketing plan

   This should convey the message that your service(s) meet these needs and desires. It should also motivate your audience to do something (make a phone call, enroll in a class, etc.).

5. Communicate the message

   Be sure you are communicating clearly. You may know what you are talking about, but does your audience?

6. Evaluate the techniques and results

* adapted from Barbara Smith and Nancy Klepsch, *Marketing Your Adult Literacy Program: A "How To" Manual*

LEARNERS AS CUSTOMERS *

People behave differently toward services, such as classes, than they do toward physical products like toothpaste:

1. Consumers seek and rely more on information from personal sources than from nonperson sources when evaluating services prior to purchase.
2. Consumers engage in greater post-purchase evaluation and information-seeking with services than with products.
3. Consumers engage in more post-purchase evaluation than pre-purchase evaluation when selecting and consuming services.
4. Consumers use price and physical facilities as the major cues to service quality.
5. The consumer's evoked set of alternatives is smaller with services than with products.
6. For many nonprofessional services, the consumer's evoked set frequently includes self-provision of the service.
7. Consumers adopt innovations in services more slowly than they adopt innovations in goods.
8. Consumers perceive greater risks when buying services than when buying products.
9. Brand switching is less frequent with services than products.

* based on Philip Kotler; from William A. Draves, *Marketing Techniques for Office Staff*

USE EVERY OPPORTUNITY FOR MARKETING *

It is important to remember that every contact with a client or potential client is a marketing opportunity. This means that every contact may influence whether or not someone registers for a class, completes that class, or comes back for another class. A client may be influenced by the way the staff answers the phone, the way the teacher greets her/him the first day of class, or the way the janitor smiles or scowls at a student walking on the newly-scrubbed floor.

Below are some suggestions which may mean a more positive reaction to contacts between your staff and clients or potential clients.

ANSWERING INQUIRIES

When a person calls or writes to inquire about a particular course or activity, he/she will never be more ready to register. Therefore, it is important to help her/him register as quickly and easily as possible.

- If at all possible, answer inquiries within 24 hours. Do not wait more than 48 hours. The longer people have to wait for the information, the less interested they are likely to be.
- In terms of marketing, responding to inquiries is an even higher priority than processing existing registrations.
- 3. Develop a system to routinely respond to inquiries, making the responses as personal as possible. For instance:
  - Write a short note to the person
  - Write a handwritten note on your standard response letter.
  - Do a computerized form letter with personalized address.
  - Use a large envelope for your catalog.

But remember, timeliness is even more critical than the personal touch.

* adapted from William A. Draves, *Marketing Techniques for Office Staff*.

MARKETING BY PHONE

- Approach phone calls with a positive attitude. Phone calls mean business.
- Don't let the phone ring more than 3 times. Even if you do not ordinarily answer the phones, but you hear it ringing more than 3 times, help out by answering it.
- When speaking on the phone, teach yourself to physically smile. This will help you sound more cheerful and pleasant.
- Never tell the caller you can't help them. Instead of saying "no", try to find some other class or service which might meet their needs.
- Keep a list of questions callers ask. This may provide clues as to what additional information needs to be provided to the public.

TELEPHONE TIPS

In marketing your program over the phone, try these tips:

- Say one thing differently to each caller to avoid sounding like a recording.
- Use the person's name.
- Give her/him your first name.
- Ask one question of each caller, to express your interest in him or her and to keep yourself stimulated.
- Write down important phrases. The way something is said may be very important.
- Be repetitious and obvious about the steps you will be taking to fill the request.
- Don't promise a client another staff person will do something. If that staff person is not in the office, have her/him get back to the client.
- Imply we are interested in the person's learning, and not just getting a registration.
- Slow down, speak clearly, and don't mumble.
- If there is a problem, restate the solution you have reached at the end of the conversation so both you and the client clearly understand the agreement.
- If the staff member being requested is not available, say "Can I help you?"
- Never tell a client "We don't know." Instead, tell him/her, "We will find out."
- Use phrases which will make them want to call again: "I'm glad to talk with you." "Please call us again." "We look forward to hearing from you again."

- If you answer the phone for someone else:

Get the name of the caller ("May I tell her who's calling?")

If that person cannot or will not take a call, say "She is not in at the moment."

If that person is on the other line, give the caller the option of holding for a moment, calling back, or having the person call him/her back.

If the person is not going to be able to return the call for a substantial period, offer to help the caller.

Never ask what the call is about. If it is necessary to know what the call is about, understand you may be offending the caller.

HANDLING COMPLAINTS

Try to think positively about complaints. They mean that people care and that there is probably a way to rectify their complaints. Here are some tips for handling complaints:

- Listen to the client's story without interrupting.
- Make a brief statement of empathy. This does not have to include an apology. (For example, "I am really sorry you've had this problem.")
- Repeat the core of the complaint, ignoring the irrelevancies such as anger or exaggeration.
- Ask pertinent questions without being defensive or offering explanations.
- Take some kind of action. (Make a suggestion; give a choice or option.)

CONVERTING CALLS INTO REGISTRATIONS

When people call for information about classes or services, be on the lookout for ways to encourage them to actually register.

Some tips:

- Ask the caller questions. Try to find out what the person is looking for.
- Link the caller's interests to your courses. Rather than saying, "We don't have that course," point out the courses you do have.
- Talk about the benefits of the course and what the course will do for the learner.
- Allow silence and allow the caller to ask questions.
- Ask the caller to register in a simple and direct way. "Would you like to register?"
- If a caller is not interested in registering, get his/her name for your mailing list and thank them for calling. Thank them for calling.

II. USING NEW TECHNOLOGIES

VIDEO AND AUDIO

The availability of relatively inexpensive video equipment has made it possible to utilize this technology as a marketing tool. The information provided here is intended to allow you either to produce a simple video yourself or to feel comfortable dealing with the experts you hire to produce the video for you. Much of the information provided can also be relevant to those who are planning PSA's for radio. (See Glossary on page 27 for any terms that may be new to you)

If you decide to find an outside producer, there are several possibilities you can explore:

Local cable TV station

Local video production companies

Colleges and universities

Local TV and radio stations (both commercial and public)

It is possible to hire someone to do any or all aspects of the production. However, you can often save money by doing as many aspects as possible yourself.

The three stages in producing a video are:

Pre-production

Production

Post-production

PRE-PRODUCTION

Careful planning before the actual production is very important. Even if you are not doing the actual production yourself, you will want to be involved in this stage. The following steps will help with pre-production planning.

1. Decide which approach you want to use. This will help determine other aspects of the production. The approach might be:

   a. **Informational**
      Purpose : to provide new or updated information
      Characterized by : rapid pace, summary at end (ex: freeze frame with words, phone numbers)

   b. **Educational**
      Purpose : to present new procedures or concepts
      Characterized by : slow pace, presentation of same information in several formats, attention to knowledge level of audience, summary at several points, use of accompanying printed copy

   c. **Motivational**
      Purpose : to cause people to take some action or hold some belief
      Characterized by : dramatic pace building to climax, use of reinforcement, use of symbols, summary that demands some action

2. Prepare a budget.
   Cost may also dictate how certain parts of the project will be done. Include such items as:

   Pre-production
      Planning/writing time
      Xeroxing
   Taping
      Crew
      Tapes (1/2 hour tape, 1" or 3/4" = approx. $24)
   Post-production
      Edit time
      Needle drop fee (music)
      Graphics, special effects

3. Prepare a script or storyboard outlining the visual and audio portions of the proposed video. If you are doing a PSA for radio, you will also want to do a script. (See pg. 15)

4. Decide who will be involved (both on-camera and off-camera). Talk with these people directly and be sure you have the proper photo releases.

5. Decide where you will do the taping:
   outdoors - what will you use as source of power?
   - will there be interfering noises in background?
   indoors - what kind of lighting?
   - will circuits handle the equipment?

6. Decide when you will do the taping -- and always allow more time than you think you will need.

7. If you are doing the taping yourself, arrange for the required equipment. (See Equipment List, p. 25)

SCRIPT OR STORYBOARD

Once the general approach and the message have been determined, it is time to prepare a script or storyboard outlining the actual video.

SCRIPT

A script is composed of words describing both the audio and video aspects of the production. It is also used for audio productions like PSA's for radio. Some suggestions* for preparation of the script:

1. Copy must be typed in two columns: one for video and the other for the accompanying audio.
2. Use only standard 8 1/2 x 11 inch paper or printed copy forms. Pica type size is preferred.
3. Set margins at five and 80, with tab stops at 40 and 45.
4. Width of columns may vary if either audio or video descriptions are unusually long. The recommended line lengths are 35 spaces for video and 40 spaces for audio. Leave five spaces between the audio and video sections.
5. Allow approximately 20 lines for 30 seconds of copy or between one-and-a-half and two seconds per line.
6. Double space between speakers and commands.
7. Type instructions and names in all caps.
8. Type the title and page number at the top of each page.
9. Never hyphenate a word at the end of a line or break a sentence at the end of a page.

See sample script on page 16..

* from William L. Hagerman, "Scriptwriting: Write and Wrong III"

The Script

"THE HEARTBREAK OF FRECKLES" #59-12 Page 7

Establish:

Veranda of Maxwell Manor. George and Martha are having their afternoon tea.

GEORGE: TELL ME, MY DEAR, DO YOU THINK THE COREOPSIS WILL BLOOM BEFORE THE SNOW THIS YEAR?

Martha glances at George with a look of great distaste.

MARTHA: (Hesitates) IF YOU INTEND TO TALK TO ME IN SUCH A MANNER, I SEE NO REASON TO CONTINUE THIS DISCUSSION ANY FURTHER!

CUT TO:

Upstairs, little Freddy is putting catsup on Susie's doll.

FREDDY: (To himself) THIS'LL FIX HER WAGON!

CUT TO:

George is kneeling by Martha's chair, holding her hand.

GEORGE: DEAREST, I KNOW THAT YOUR FRECKLES HAVE ALWAYS KEPT US APART, BUT I THINK I MAY HAVE FOUND A SOLUTION.

Martha evidences some skeptisism.

MARTHA: REALLY?

George removes a spray can and masking tape from his pocket.

GEORGE: IT'S REALLY QUITE SIMPLE. THIS RUSTOLEUM CAN COMPLETELY HIDE YOUR FRECKLES, SO THAT NEVER AGAIN WILL YOU BE FACED WITH LAUGHTER WHEREVER YOU GO.

(CONTINUES)

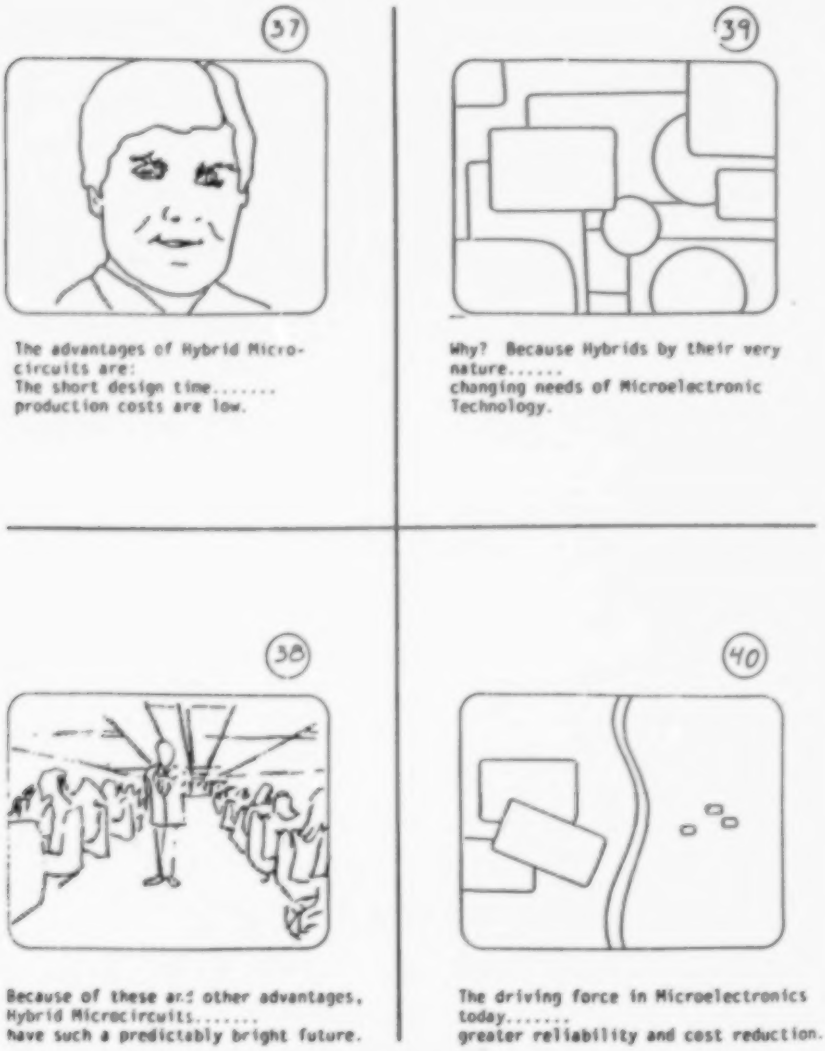
A "pseudo-storyboard" television style script, with visual instructions on the left and dialog on the right.

Figure 1. Sample script.

STORYBOARD

A storyboard is plan of the production using a series of panels of pictures (usually sketches) with the accompanying audio.

See sample storyboard below.

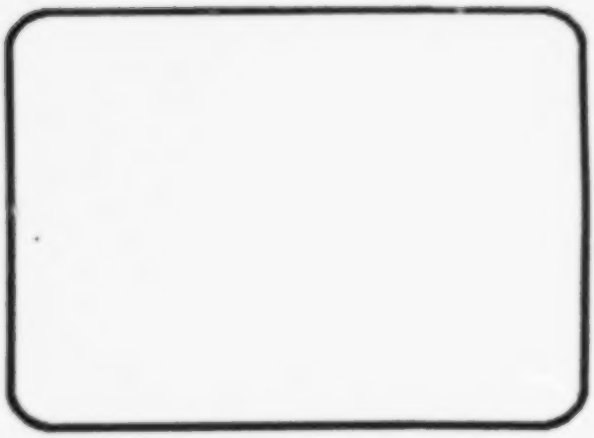

37
The advantages of Hybrid Micro-circuits are:
The short design time.....
production costs are low.
39
Why? Because Hybrids by their very nature.....
changing needs of Microelectronic Technology.
38
Because of these and other advantages, Hybrid Microcircuits.....
have such a predictably bright future.
40
The driving force in Microelectronics today.....
greater reliability and cost reduction.

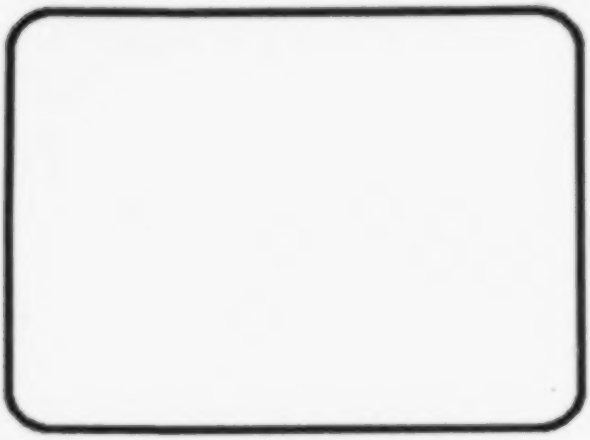
A portion of the storyboard for a video training program entitled "Hybrid Technology—At Work Everywhere," which was produced by Burr-Brown Corp. for the International Society of Hybrid Microelectronics.

Figure 2. Sample storyboard.

WORKSHEET A

STORYBOARD





PRODUCTION TIPS*

1. **Look before you shoot.**
   Taking the time to scout the location beforehand may reduce or eliminate unexpected problems.

   - Walk through and explore your location before you unload and set up your equipment.
   - Look for other shots which you can use in editing.
   - Select camera positions, backgrounds and angles which will help insure that you get the best possible shots.

2. **Make sure your subject is properly lit.**
   A well-lit picture has some important advantages: (a) there is more depth of color; (b) it is easier to focus the camera in good light because the aperture opening is smaller, giving a greater depth of field.

   - Lighting takes a considerable amount of time to set up. Allow at least an hour to get the lights up and correctly oriented.
   - Set angles which minimize bright backgrounds. Don't try to shoot anyone in front of a window.
   - Choose lens positions which help you "reduce the videospace" when you cannot properly illuminate an entire area.
   - Make sure your subject is the brightest object in the frame.
   - To avoid a silhouette, don't videotape darker-skinned people in front of a white or very light background.

3. **Select a flattering angle for your subject.**
   Position your subject so her/his shoulders and body are seen by the camera in a 3/4 angle with head turned to face the camera. This makes him/her look slimmer, allows eye contact with the audience, and keeps the image from looking like a police mug shot.

* adapted from Tim Broderick, "16 Easy Tips for Better Camera Technique" (Sony Institute of Applied Video Technology) and "Hot Tips", Dancing Iris (Somerville, MA)

4. **Choose an effective, simple composition.**
   When shooting an inanimate object, try to show as many surfaces of the object as possible.

5. **Incorporate subject movement.**
   Remember that you are working with a visual medium and that movement will create interest.

6. **Avoid trying to show too much.**
   The television screen is a small area, and detail is not readily seen in long or wide shots.

7. **Use a good fluid-head tripod.**
   When there is no motion in your shot, you want your camera work to be steady and unobtrusive.

8. **Use the wide angle lens position.**
   Try moving in closer to your subject (dollying) and keeping wide, rather than simply setting up and zooming in.

9. **Start and stop all camera movements with a static well-composed shot.**
   This allows greater flexibility in editing.

10. **Rehearse.**

- Practice moving the camera on the tripod or on a dolly. For a particularly difficult or complex move, practice it a couple of times.
- You might find that putting marks down will help you repeat a move using a dolly.
- Rehearsal will also help you find and avoid bumps and rough spots in the floor prior to the actual shooting.

11. **Avoid zooms.**
    The one sign of amateur camera work is the overuse of the zoom lens. A zoom should be used to either focus attention or reveal information. Otherwise, it should not be used.

12. Cover yourself by shooting at a variety of speeds.

- Shoot your camera moves at various rates. In editing, if you want a fast zoom instead of a slow one, you'll have it.
- The best coverage will also include static shots of every subject you have done a moving shot on.

13. Shoot overlapping action.

- Change image size and camera angle by at least thirty to forty-five degrees whenever there is a break in the action.
- Repeat the last part of an action from the previous angle, and continue shooting until you are well into the next action.
- Get enough material so you can make your decision in the editing room, not in the field.

14. Shoot plenty of reaction shots, cut-aways, and other silent footage.
These will be particularly useful in editing.

- Make sure any reversals (reaction shots of two people in conversation) approximate each other in screen size.

15. Establish a shooting line.

- Draw an imaginary line through a scene and keep all of your camera positions to one side of that line. This will help you maintain directional continuity.
- Cover yourself with some point of view shots that have no screen direction.

16. Be innovative.

- The best and most creative shots come from experimentation.
- Try focus shifts, panning to reaction shots, unfocused shots, or anything else you think will help show what you want.
- Be careful not to let your technique overwhelm your content, however.

POST-PRODUCTION: EDITING

If the pre-production planning and the taping have been done carefully, the editing will be much easier. Because careful and skilled editing may make the difference between an adequate video and a very good video, this is the place where the involvement of experts may be most necessary.

The example of a simple video production described on page 23 includes one approach to editing.

TIPS TO IMPROVE YOUR VIDEOGRAPHICS *

1. Choose only 2 or 3 different sizes of text throughout the video. Use larger text for titles and smaller sizes for phrases.
2. Display only 1 or 2 fonts on the screen at the same time.
3. Separate text from background using black edges.
4. Select warm colors (whites, yellows, tans) for graphics to bring them visually forward in space.
5. Color backgrounds in cool tones (blues, purples, greys).
6. Place graphics close to or overlapping (without obscuring) the object to which they refer.
7. Choose appropriate locations on screen for placing text to identify video.
   Titles - in center
   Names and captions - lower third of screen
   Location and time - upper third of screen
8. Put only small amounts of text on screen, usually in phrases.
9. Leave text on screen long enough to be read twice out loud.
10. Space characters close enough together to allow whole words and phrases to be read.

* adapted from "12 Creative Ways to Improve Your Videographics" by Bruce Reynolds (SONY Institute of Applied Video Technology)

SAMPLE PLAN FOR A VIDEO *

The following is a plan for a simple video to market a literacy program. This is based on these rules:

1. Keep it simple -- elaborate productions end up being so complicated and time-consuming that they may never be completed.
2. Keep it short.
3. Choose articulate, committed people as subjects, preferably "graduates" of your own program.

PRODUCTION

The taping is done in two segments:

1. "Talking head" footage shot in a formal setting.
   - Ask the subject to dress as if she/he were going out to a nice restaurant for dinner.
   - Reassure subject that any pauses or mistakes can be edited out easily.
   - Ask subject to look into the camera and talk as if he/she were talking to a person.
   - Give the person a set of topics you would like her/him to speak about, such as:

     What he/she does - job title and company
     When and how she/he got involved in the literacy program
     The benefits of the program
     How family and friends feel about his/her involvement in the literacy program
     Any advice to others about coming to the literacy program

   - Tape the session without rehearsal to maintain a spontaneous quality.

* adapted from Beverly W. Lydiard, *Project Explore: A Guide to Making Low Cost Videotapes of Nontraditional Role Models*

2. "Silent" footage at the person's worksite, home, class or other appropriate location

- Shoot at least 15 minutes of silent footage using at least five different scenes.
- Include other people, particularly family members, whenever possible.

POST-PRODUCTION

One approach to editing might be as follows:

1. Make detailed logs of all raw footage. Include on these logs information about the subject matter covered and the beginning and end time points for this information (use tape deck counter for minute/second information).
2. Using these logs, then make a "paper edit", deciding which sound footage you want and which silent footage will go well with it.
3. Lay down the sound footage exactly as you want it on your master tape, without regard to how the video looks -- don't worry about awkward jump cuts, because you will be covering these up with silent footage later. Do not include any off camera voices.
4. Make a log of your edited master sound tape, noting the subject matter covered and time, being sure to indicate times of bad jump cuts which must be covered by silent footage.
5. Make a paper edit, using your silent footage log and deciding what silent footage will be used to cover up each bad cut. If there are not too many bad cuts to cover up and you have lots of silent footage, figure out places where it might be included to break up the monotony of looking at one scene or person for long periods of time.
6. Do your silent footage inserts. Be sure the editing machine is set for silent editing only or you'll wipe out your sound track!
7. Titles and music can be added at the beginning and end. See "Tips to Improve Your Videographics", p. 22, for other ways to use graphics.

EQUIPMENT LIST *

Videocamera - for shooting 3/4" or 1" tapes (the 1/2" videocameras being sold for home use will not produce broadcast-quality tape and there are few editing facilities available)

Tripod - choose one with a good fluid head

Microphones - the kind(s) you choose will depend on the situation (See Figure 3)

Omni (omni-directional)

1. Pick-up pattern is from all directions equally
2. Good for picking up ambient sound
3. Often designed to be hand-held; sometimes camera-mounted

Cardioid

1. Heart-shaped pick-up pattern
2. Good for interviews and music recording
3. Usually hand-held; can be camera-mounted

Lavalier

1. Omni pick-up pattern within a close range
2. Best mike for interviews
3. Usually attached to shirt of the speaker

PZM (pressure zone microphone)

1. Picks up everything coming at it from its sensitive side
2. Excellent for picking up all speakers within a small area
3. Can be placed on a table, floor, or wall

Shotgun

1. Uni-directional pick-up pattern
2. Used for picking up specific sound from a distance
3. Hand held or on a mike stand or boom

Mixer - allows various audio sources (mikes, tape recorders, etc.) to be combined and mixed together with their relative sound levels being adjusted

Headphones - person doing the audio should have a set of headphones that will block out the room noise so only the sound coming through the mike(s) is heard.

*from "Hot Tips," Dancing Iris (Somerville, MA)

Lights - In most cases, for indoor shooting, you will need extra lighting. Lights can be rented if they are not otherwise available. The amount of lighting will depend on the circumstances. For instance, there should be:

3 lights for a single speaker
4-6 lights for a group of people (ex: a panel)

Miscellaneous

Cables - various kinds of different lengths to connect mikes, mixer, tape recorders, camera, etc

Adaptors - to connect various kinds of cables and plugs

Batteries - many mikes, the mixer, and the camera may need batteries

Videotape - 3/4" or 1"

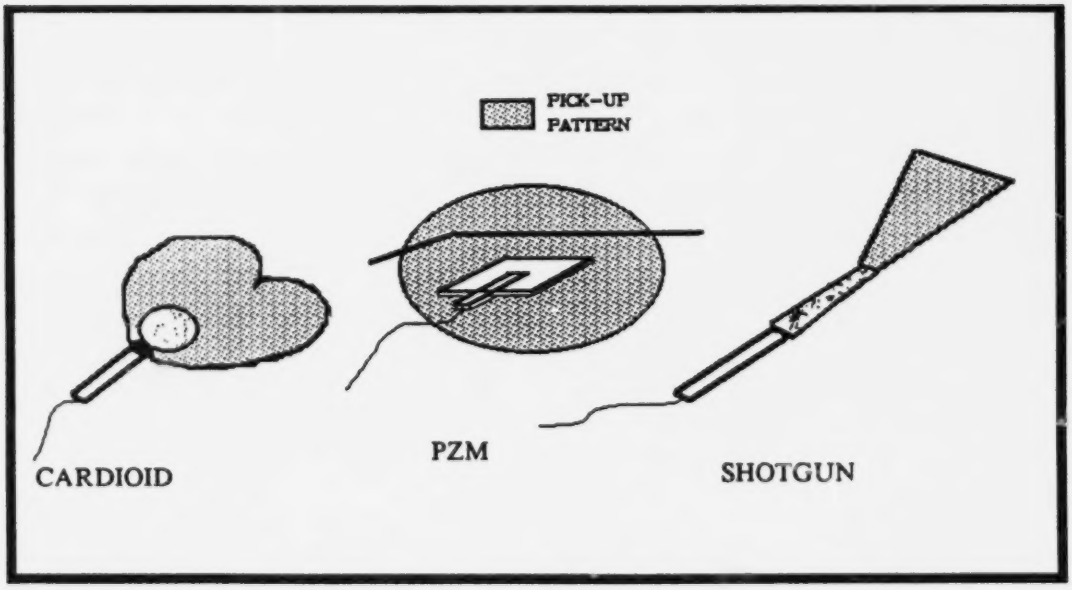


Figure 3. Microphones

GLOSSARY - VIDEO AND AUDIO

ambience - natural background sounds found everywhere, which are a part of the recorded audio

aperture - the variable opening in a lens used to control the amount of light allowed into the camera; also called the **iris**

blocking - the placement and movement of both talent and camera positions prior to and during production

cardioid microphone - a microphone with a heart-shaped pickup pattern

character generator - an electronic typewriter that creates letters, symbols, color lines and backgrounds on the screen

chroma-key - method of shooting an object or person against a solid colored background and replacing the background with another video image (ex: the map behind the weather person on the news)

close-up (CU) - shot that eliminates most elements from the screen except the subject (head-and-shoulders; sometimes only the face)

crawl - text moves horizontally across the screen

cut - rapid and complete replacement of one shot with another, with no overlap

cutaway - a shot that can serve to cover an edit, such as one of the interviewer or of an item being discussed

depth of field - the range (in distance from the lens) that will be acceptably sharp; varies with distance, focal length of lens, and aperture

dissolve - replace one image with another, with a slight overlap via superimposition of the second (one image fades while the other emerges)

* from Lon McQuillin, *The Video Production Guide* and William L. Hagerman, "Scriptwriting: Write and Wrong III"

dolly - (noun) camera support mounted on wheels to allow smooth movement; (verb) moving the camera towards or away from the subject

establishing shot - a shot showing an overall view of a location, used to establish the location and/or characters to be involved; usually a wide shot

fade - gradual increase or decrease of the picture (from or to black) or the audio (from or to silence)

fade in - the beginning of a program or segment in which the picture fades from black to the first scene

fade out - the end of a program sequence in which the picture fades to black

fluid head - a tripod head on which a camera is mounted, that uses a viscuous fluid controlled by a valve to prove variable degrees of resistance to movement, thus smoothing camera moves

focal length - in a lens, the distance from where the light rays converge (optical nodal point) to the place where the image is formed (focal plane, usually the film)

follow shot - camera follows the action

freeze frame - stopping the motion of a scene and displaying one frame for an extended period

graphics - printed material and artwork seen on the screen

jump cut - any cut in editing that usually jars or disturbs the viewer

lavalier - type of microphone that can be hung on a cord around the neck or clipped onto clothing

location - any place other than a studio used as a production setting

marks - places marked on the floor, usually with tape, to indicate talent and camera positions

mixer - device that allows various audio sources to be combined and mixed together, with their relative levels adjusted

needle drop - a unit of measure in determining payment for use of musical pieces in programs

omnidirectional - describes a microphone that picks up sounds from all directions

on mike - a person or sound in close proximity to the microphone

off mike - a sound outside the microphone's primary pick-up pattern so sound seems to be at a distance

pan - movement of the camera in a horizontal plane with the mount (or tripod) serving as an axis

point of view (POV) - from the perspective of a specified character

P.Z.M. - pressure zone microphone; flat microphone that picks up sound on only one side

reaction shot - a shot of one or more people reacting to some action or dialog

remote - indicates production done on location, rather than in the studio

roll - in graphics, information moving vertically on the screen, usually from bottom to top, as with credits at the end of a program

script - the document composed of words describing both the audio and video aspects of a production

shotgun microphone - a highly directional microphone used to pick up sound over a distance or to isolate sounds in a noisy area (i.e., remarks from an audience)

storyboard - a plan of a production using a series of panels of pictures (usually sketches) with the accompanying audio

super (superimposition) - a dissolve stopped half way through; placing one image (such as text or a person's name) over another stop action (image on the screen is frozen in place)

talent - generic term for people who appear or are heard in a program

talking head - term for a taped sequence in which a person is talking to the camera or to an interviewer with no other action

tilt - movement of the camera up and down (in a vertical plane) with the mount (or tripod) serving as an axis.

tripod - a camera mounting device with three legs

truck - the act of moving the camera from side to side on wheels relative to the shot being taken

V.C.R. - Video Cassette Recorder

V.H.S. (Video Home System) - the 1/2-inch videocassette format developed by JVC for consumer and industrial use

V.T.R. - Video Tape Recorder

videocassette - a plastic shell containing two reels and a given length of videotape (comes in various sizes including 1", 3/4", and 1/2")

voice over (VO) - narration read during a shot or series of shots

wipe - a transition from one scene to another wherein the new scene is revealed by a moving line or pattern

zoom - (noun) lens with a variable focal length; (verb) the act of varying the focal length of a zoom lens (camera stays in place, unlike "dolly" in which the camera moves)

COMPUTERS

Personal computers have become more and more powerful as they have also dropped in price. Therefore, the option of using computers is a real one for many agencies and offices. The information here provides a brief look at the way you might use computers in your work. There is also a summary of the basics of a computer system for those who have not had an opportunity to become familiar with computers.* Perhaps this will inspire you to begin exploring for yourself the many ways you might use computers in your work. At the least, it will allow you to communicate a little more confidently with those people around you who do know the in's and out's of your computer system. (See Glossary on page 45 for any terms which might be unfamiliar to you.)

In many of your agencies, computers may already be used for many administrative tasks. There are a number of ways you can also use computers to assist you in your marketing efforts. The most common of these are:

Wordprocessing - for correspondence including "form letters"; preparation of press releases, PSA's

Databases - for identifying specific people or groups within a total population of clients, agencies, staff members, etc.

If you have had any experience with computers, you have probably used wordprocessing. Therefore, our emphasis here will be on databases which may not be as familiar to some of you.

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* This is only a very superficial discussion of computers. If you would like to learn more, we would recommend *The Women's Computer Literacy Handbook* by Deborah L. Brecher. This does not take a simplistic or condescending approach, but presents very technical information using familiar analogies.

DATABASES

A detailed discussion of databases is beyond our scope. You may want to enlist the help of an "expert" in planning a database management system. It is much easier to design the system you want from the beginning rather than adding and changing as you go along. In fact, some of the less sophisticated database software does not allow you to make changes in the basic structure after you start using it.

There are three basic functions of any data management system, whether it is manual or on a computer. These are:

1. **Data Entry** - The system must provide a structure into which data can be stored. The system must also allow for inspection of the data and the making of changes and corrections.

2. **Data Queries** - The system must allow a user to locate and look at specific parts of the stored data.

3. **Report Generation** - The system must allow information to be organized and summarized. This differs from data query in that a report usually involves the entire data base and the information generated is usually transformed in some way. A set of mailing labels in zip code order or a list of all people who were born after 1960 would be examples of simple reports.

Probably the easiest way to describe a database management system is to compare it to a manual filing system. Let's assume that in your office you have a box in which you have a 3 x 5 card for every client who has enrolled in one of your classes over the past 5 years. These cards were printed with blank spaces labeled for such basic information as name, address, phone number, birthdate, native language, etc. You file these in alphabetical order by last name.

Now let's look at this same filing system in a database management system.

Manual		Database
each 3 x 5 card	=	record
each blank space on the 3 x 5 card (with accompanying label)	=	field
file box	=	file

(See Figure 4)

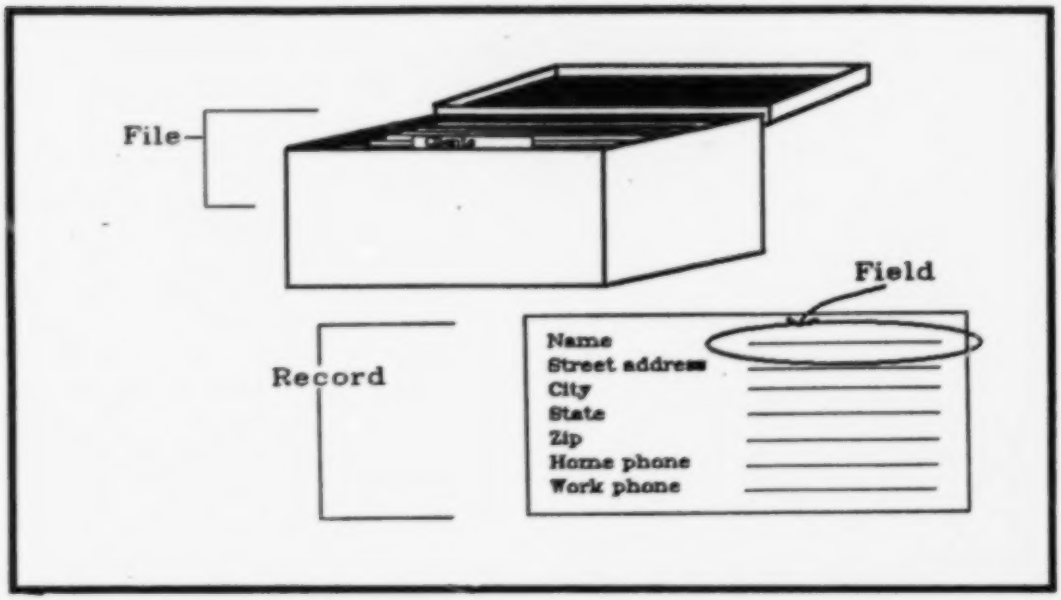

Figure 4. Relationship between manual filing system and computer database

In order to carry out the operations involved in a database management system, the **records** for all clients are gathered into a **file**. Each of these records must have an identical structure in terms of the **fields** it contains. What differs for each record is the data contained in these fields.

In the example above, you might set up a "client" file with a record for each current or former client. There could be a number of fields in each record depending on the kinds of information you will want to be able to use in retrieving records. Let's assume that the "client" file includes these fields:

Last name	Street
First name	City
Middle name	State
Home phone	Zip
Work phone	Birthdate
Social Security number	Native language
Sex	

In order to sort files more easily, it is important to put each item in a discrete field. Therefore, you would want to separate last name and first name, the various parts of the address, etc. This would allow you to get lists which fit very specific criteria, such as:

- all people on your address list who are out of state
- all people who are native speakers of Spanish
- all people who live in a specific city or town

The other important factor in designing a database is to have one field that will be unique for each record. For databases of people, this is often the Social Security number which, unlike names, should never be the same for any two people.

Suppose you want to do a mailing to all the clients and former clients who live close to the site of a new class. You decide that the easiest way to do that is to send the mailing to people in the three zip codes closest to that location. With the manual system, you would have to look through all the cards and pull out those whose zip codes match the three you have identified for your mailing. Someone would have to take those cards and type the names and addresses on labels or envelopes. The cards would then have to be refiled alphabetically.

With the database your job is much easier. You simply ask the computer to look at each record and compare your three zip codes with the zip codes entered into the field labeled "Zip". The computer can then take all the records that fit this criteria and sort them in one of several ways--in zip code order, in alphabetical order by last name, etc. Finally, you can get the list on a regular printout or printed on labels ready for mailing.

Databases can become very sophisticated tools for doing all sorts of record-keeping, reports, etc. Some of the more powerful database management systems are relational databases. To describe these relational databases in simple terms, they allow you to set up a number of separate files which can be linked to one another through the use of one common field (for instance, the Social Security number). Using this kind of database, you might set up a file for keeping track of enrollment, another for attendance, and another for test scores. Any of these could then be combined with a file like that described above which has information like address, birthdate, etc. This would allow you to get such information as:

- all current enrollees who were born before 1930
- the names and phone numbers of people who scored below a certain point on a test
- a set of mailing labels of all people who enrolled in a particular class in the Spring of 1985
- a breakdown of current enrollment by sex
- participants who meet an eligibility requirement of being on welfare

The primary advantages of databases over manual filing systems are the speed with which they can find relevant records and the fact that they can search for records that meet two or more criteria.

Some of the examples above should suggest ways you can use databases to assist in your marketing efforts. Some specific ideas:

Targeted mailings

Direct mail (see page 50) can be a very effective way to market your programs and services. In many cases you may be able to identify a particular group that would be most interested in a specific class. For instance, you may know from past experience that 95% of your enrollees at a particular site come from within 5 miles of that location. Therefore, it would probably be most effective to send a flyer to people who live within that area (which, depending on the circumstances, might be identified by city, zip code, or even street).

Targeted mailings can also exclude certain groups. For example, you may feel that it is a waste of postage to send a flyer about a night class to senior citizens because they will not travel at night. (The computer can also help determine the characteristics of the most promising enrollment prospects by providing data on past enrollment compared to various criteria - age, sex, home address, etc.)

Certain programs have specific eligibility criteria. If you have included fields in your database that record information related to these criteria, it would be easy to send a mailing only to potential clients who meet these criteria.

Personal touch

You may decide that you will try to attack the problem of poor attendance by having the teachers call any clients who miss more than three consecutive classes. Rather than have each teacher keep track of who needs to be called, you might generate a weekly list of names and phone numbers based on the attendance records kept in a database file.

In order to convey the idea to each participant that she/he is important, the director might send a birthday card to each person who has enrolled in a class in the past two years. This is based on a birthday list generated weekly using the file with names, addresses, and birthdates along with the file which contains enrollment data.

You could send a letter of congratulations to every person who successfully completes a class. While this may be a "form" letter, you can personalize the inside address and greeting and perhaps even add an individualized sentence or two. This can be done in many cases by integrating your database with wordprocessing software.

There are certain key questions that you must answer in planning your database:

1. What fields do I want to have?
2. What are the names of the fields?
3. What kind of information will these fields contain?

These questions all go back to the basic question of what kind of information you want to be able to retrieve from the database, either now or in the future.

The following worksheets will help you plan your database. Some information about the labels on WORKSHEET C:

FIELD NAME - Databases limit the size of the names (labels) which you can use for the fields (typically 8 characters). Each field must have a different name, and this name should convey in short form the content of the field. For instance:

LNAME = last name
FNAME = first name
ZIP = zip code
HPHONE = home phone number

CONTENT - This is for your own use to remind yourself what information will be put in each field.

FIELD LENGTH - You must indicate when you create the database how large each field will be, that is the maximum number of characters it will contain. You should try to anticipate the largest possible entry in any given field. For instance, if you know that you will never have a last name longer than 20 letters, you would make the field length for LNAME = 20. Because it may be difficult or impossible to change this once you have data in the file, you don't want to underestimate this figure. On the other hand, if you make this number too large, you will waste a lot of unnecessary space in your file. This will slow the access time and may even cause you to run out of space with a very large database. Also, most databases limit the length of fields.

FIELD TYPE - Most databases require you to indicate the type of information to be entered into each field. This is because the program handles the different categories of information in different ways. The terms used may differ and some databases include more categories than others. However, the most common field types are:

CHARACTERS - any character including letters, numbers, and symbols; no calculations can be performed
NUMERIC - only numbers; calculations can be performed
LOGICAL - single character representing a yes-no, true-false choice

Some databases (dBase III, for example) include separate fields for DATE and for longer text (called MEMO in dBase III).

One final caution: don't underestimate the amount of time it will take to plan and prepare the database. By far the biggest expense in developing any database is the time involved in inputting the data into the computer. The more fields you include, the more time it will take to do the inputting.

WORKSHEET B

PLANNING YOUR DATABASE

In order to determine what fields to include in your database, try to think of every kind of information you might want to retrieve from the database. (If you are planning a relational database, these fields may not all be in the same file.) Then identify the fields that will have to included in the database file(s) in order to retrieve that information. Here are some examples to get you started:

INFORMATION WANTED	FIELD(S) REQUIRED
1. mailing labels in zip code order for all current clients	zip code rest of address name enrollment dates for classes
2. number of men and women currently enrolled in the classes at any given center	sex place enrolled enrollment dates for classes
3. mailing labels for anyone from Centerville who has enrolled in the last 5 years	name city rest of address enrollment dates for classes
4. phone list of all people on mailing list who speak Spanish as their native language	name native language phone numbers (home, work)
5.	
6.	
7.	
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15.	
16.	
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18.	
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20.	

THE BASICS OF A COMPUTER SYSTEM

A computer system consists of these basic parts:

hardware - overall term for the equipment or machinery used in various computer functions

software - overall term for computer programs, those instructions written for a computer to follow in carrying out its various operations

data - the raw material supplied from the outside upon which the computer system performs its operations (examples: names and payroll figures; names and addresses)

HARDWARE

The hardware used in computer systems is varied, and new developments make this a continuously changing realm. We will look at the most common pieces of computer hardware. The equipment falls into two general categories:

central processing unit (CPU)

peripherals

The **central processing unit**, or CPU, is the "brain" of any computer. All the other hardware of the computer system (the peripherals) connects physically into the CPU. In spite of all the magical (or scary) things computers seem to do, the fact is that computers can really only do two things: add and compare.

The **peripherals*** are optional devices which may help the computer system operate in a way that is most useful for the human beings who interact with the computer. However, a computer may or may not have any of these peripherals and still be considered a computer. The peripherals perform one of several important functions. They may be:

input devices - used to get information or data into the computer; also used to enter software

output devices - used to get the information or data out of the computer once the operations are completed

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* NOTE: In making comparisons before purchasing a computer, be sure you know what peripherals are included. In some cases, you may have to buy monitor, keyboard, disk drives, etc. separately which can make a great deal of difference in the cost.

Input devices provide a means for a computer user to enter data into the CPU where the intended operations can be performed. Some common input devices include:

keyboard

cassette player

modem

scanner/digitizer

disk drive

Output devices provide a means to get the resulting information back out in a form that can be used. Some input devices are also output devices. Examples of common output devices include:

monitor (CRT)

printer

plotter

modem

disk drive

cassette player

There are a few other peripherals that perform special functions. These include the mouse and the touchscreen which are used with some software to move the cursor around the screen. Currently being developed are speech-recognition input devices which will translate ordinary speech into a format that can be used by the computer. There are also output devices that translate information from the computer into spoken words.

While there are a number of options in putting together a computer system, the most common configuration would be something like this:

INPUT - Data is entered into the computer by typing it directly on a keyboard or by loading it into the computer from some magnetic source (usually a floppy disk if you are using a personal computer).

OUTPUT - The data appears on a monitor. It can be saved by capturing it on disk (or some other magnetic format) and/or getting it in hard copy from a printer.

STORAGE - Since you will usually want to use the data again, you need to have some means of storing the data in the electronic form that the computer uses. This is most commonly done on either a floppy or a fixed disk. (There are several other storage media, including magnetic tape, but these are less frequently used with personal computers.)

While there may be some choice in the keyboard and monitor (monochrome vs color), these often come as part of a package deal with the CPU. You may, however, have more choice in things like storage methods and printers.

Floppy disks vs disk drives - Both the software and the data are stored on some sort of magnetic medium. In personal computers, this is most commonly either floppy disks or a fixed disk (also called a hard disk). Floppy disks are portable and come in several sizes. For instance, a standard 5 1/2" two-sided, double-density disk has 360K (360 kilobytes where a kilobyte equals one thousand bytes) of storage space. The computer reads these floppy disks using what is called a disk drive. Naturally, the size of disk you use must be compatible with the kind of disk drive your computer has.

With a fixed disk, the drive and disk are built into the computer (or into a box that is connected to the CPU). A fixed disk provides a great deal more storage space and may be necessary if you are using the computer to deal with large databases or to do desktop publishing. Fixed disks are described by the amount of storage space on them, measured in megabytes (one megabyte equals one million bytes).

Printers - In order to get hard copy output from your computer, you will need a printer. The three main types of printers currently available are:

dot matrix printer

daisy wheel printer

laser printer

The **dot matrix printer** uses dots to generate printed characters. (See Figure 5). The more dots the printer produces per square inch to make up the characters, the better the quality of the printed text. Dot matrix printers often have the capacity to produce both draft quality documents (by using fewer dots) and near-letter-quality documents (with more dots per square inch but at a slower speed).

The **daisy wheel printer** produces type that looks like a good electric typewriter. The characters are on a wheel rather than on a ball like a selectric typewriter, hence the name. Like typewriter balls, wheels come in a variety of typefaces and sizes.

The **laser printer** uses technology similar to that of a photocopy machine. A laser beam scans the page, leaving a positive electrical image of the page on a print drum. The paper is pulled past the drum where the corona (a fine wire) transfers the powdered toner to the paper. A heat process fuses the toner to the paper. Laser printers produce print which approaches typeset quality. (NOTE: This workbook was printed on a laser printer - a Hewlitt Packard LaserJet Series II.)

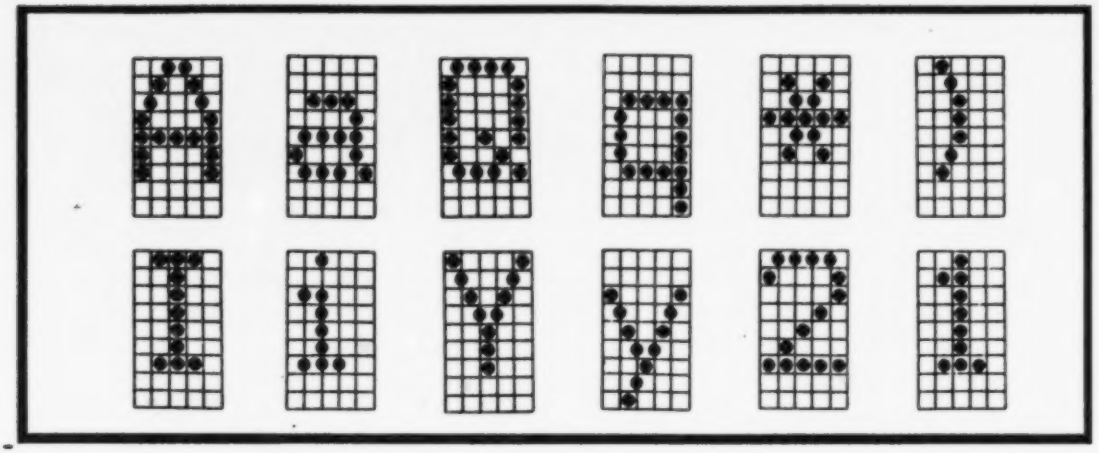


Figure 5. Enlargement of letters produced on a dot matrix printer (5 dots across by 9 dots down)

SOFTWARE

While most computers allow users to write their own computer programs, this is a very tedious task which is almost never necessary. So many computer programs are now available that it is usually possible to find one that suits your purpose. You can buy software to play games, compose music, practice landing an airplace (flight simulators), or paint pictures. However, the most common categories of software for business use are:

word processing

spreadsheets

database management

desktop publishing

telecommunications

Word processing programs make the computer act like typewriter. However, this is a very smart typewriter that allows you to make corrections and changes very quickly. There are many such word processing programs with a variety of refinements, special features, etc. However, there are certain basic functions which even the least expensive word processing program will allow you to do. For instance, you can correct mistakes by typing over or deleting. You can insert missing letters, words, even whole paragraphs. You can move whole sections from one part of a document to another. You can search for a particular word or phrase throughout a document and replace it with another word or phrase. And the best part, compared to a regular typewriter, is that you can make all these corrections and changes without retyping

the whole document. You just make the changes in the computer and print out the new document.

Spreadsheets allow you to put figures in columns and lines and to do various mathematical operations on these figures. These are most commonly used in budgeting and financial planning.

Database management software provides an electronic filing system in which many records can be stored, organized, and compared. Just as word processing programs may replace your typewriter, database management systems may replace your file cabinets. For instance, a database would allow you to store in the computer all the information you have accumulated on each client in your program. This might include name, address, telephone number, Social Security number, birthdate, all the classes in which she/he has enrolled, reading level, etc. Using this database, you could then generate a wide variety of lists, reports, etc. Some examples:

- address labels for all people in a certain zip code
- a list of all current clients with birthdays this month
- a list of all former clients who have not enrolled in a class for at least a year
- address labels for all clients who are reading at less than 2nd grade level

Because databases can be so important in marketing, they were discussed in more detail on page 32.

Desktop publishing is a fairly new development which puts the production of near-typeset-quality documents within reach of many who have had to rely on outside typesetting in the past. The software is usually some kind of page makeup program which takes files from word processing programs, graphic programs, spreadsheets, etc. and formats them on the page with various sizes and styles of types and other graphic elements. This software is usually most effective when used with a laser printer. (NOTE: This workbook was produced using a piece of desktop publishing software called Ventura Publisher.)

Telecommunications software allows you to send and receive information from remote locations through your modem. Among the things which this might allow you to do are:

- exchange data with other agencies
- search one of the national bibliographic databases for citations on a particular topic
- exchange information with other people who have similar interests all over the country via one of the many electronic "bulletin boards"

GLOSSARY - COMPUTERS

ASCII (pronounced "Ask-ee") - acronym for American Standard Code for Information Interchange; a standard code used by all personal computers which specifies the **binary number codes** for letters, numbers, symbols, and special characters (for instance A = 01000001 and a = 01100001; 2 = 00110010 and ! = 00100001)

backup - (noun) a reserve copy of your data or program files that can be used in case the current file is lost or damaged; (verb) the act of creating a reserve copy of files

BASIC - an acronym for Beginners All Purpose Symbolic Instruction Code; a **programming language** that uses simple English words and common mathematical symbols to perform the necessary arithmetic and logical operations to solve problems

baud - a rate of information flow given in **bits** per second (bps); used primarily in describing the speed of communication between two computers using **modems** (the baud rate of both **modems** must be the same)

binary code - code recognized by computers that consists of only 0's and 1's to represent data; uses the binary number system which is based on the number 2

bit - Binary Digit; smallest unit of digital information with which a computer deals; has only two states: zero and one (a bit can represent: a yes/no choice, a distinction between true and false, or whether a circuit is on or off)

boot - to turn on a computer and load the **operating system**

bug - an error in programming which causes faulty outputs; can also mean a **hardware** malfunction or design error

byte - the basic unit of information in a computer; commonly consists of a sequence of eight **binary bits**, usually handled as a unit; one byte generally represents one **character** (SEE: **ASCII, binary system**)

character - single items that can be arranged in groups to stand for information. There are two forms: (1) numbers, letters, graphic symbols, etc. that can be understood by human beings, and (2) groups of **binary digits** that can be understood by the computer. A character is usually represented by one **byte**.

code - the relationship between **bits** and a set of **characters**. Personal computers deal only with bits when executing a **program**. Therefore, letters, numbers, and other characters must be translated into bits where each character has a bit code representative. The most commonly used code is **ASCII**.

command - an instruction given to the system through an **input device** or **peripheral** to execute some function

compatibility - one of two types of compatibility: **program** and **hardware**. Program compatibility refers to the ability to run a program on a variety of computers without changing the program language. Hardware compatibility means that the various components (printers, discs, keyboards, etc.) may be connected directly and can communicate with each other

computer program - set of instructions written for a computer to follow in carrying out certain operations (examples: payroll accounting, sorting and printing mailing labels)

CPU - Central Processing Unit; the brain of the computer, controlling what the computer does

CRT - Cathode Ray Tube; the device similar in appearance to a television screen on which information in the form of **characters** and **graphic** designs may be displayed

cursor - movable marker that shows your current position on the **CRT**

daisy wheel printer - printer which produces characters when a hammer strikes a character on the perimeter of a wheel mechanism forcing it against the paper

data - the information given to or received from a computer

desktop publishing - term to describe the application of personal computers to the production process of publishing; usually accomplished with page makeup software and a **laser printer**

digitizer (SEE: **scanner**)

disk (or **disc**) - a record-like magnetic-coated piece of material that can store programs and data (See: **floppy disk, hard disk**)

disk drive - the device that stores and retrieves information on a **disk**

DOS - Disk Operating System; the software that controls the overall operation of a computer system; two of the most common operating systems are MS-DOS (or PC-DOS) and CP/M

dot matrix printer - printer which forms characters from a matrix of dots, usually 5 x 7 (five dots across and seven dots down) or 7 x 9

file - collection of related data with an identifying name; programs and commands are contained in files as are the documents and other data created by programs

filename - number/letter characters that identify a file

fixed disk (SEE: **hard disk**)

floppy disk (**floppy**) - pliable disk which looks like a small phonograph record and which is used to store data (See: **hard disk**)

hard copy - data or information printed on paper (as distinguished from the temporary image on the **CRT** or data stored on some storage medium such as a **disk**)

hard disk (fixed disk) - rigid metal disk encased in heavy plastic used to store data

hardware - overall term for the equipment or machinery used in various computer functions including the monitor, keyboard, CPU, printer, and modem

input - information going into the computer or into a peripheral

keyboard - a device for typing information into a computer; similar in design and function to a typewriter keyboard although it typically has several additional keys for specific computer functions

kilobyte (K) - 1,024 bytes

language - a format by which a programmer can communicate more efficiently with the computer where predetermined commands will yield requested actions (**BASIC** is an example)

load - to transfer data and programs from a disk into the computer's memory

magnetic tape - a storage medium on which characters are represented by patterns of electrical charges

mass storage - devices such as **discs** or **magnetic tapes** used to store large quantities of data

matrix printer (SEE: **dot matrix printer**)

megabyte (M) - 1,048,576 bytes; 1024 kilobytes

memory - the integrated circuits of a computer which store information; referred to as **RAM** and **ROM**

modem - MOdulator/DEModulator; a device which changes the digital output of computers into analog form so it can be transmitted over telephone lines (thus allowing computers in distant locations to communicate with each other)

monitor - a video display unit which uses a cathode ray tube to generate characters; it looks like a normal TV screen, but it has a much higher degree of resolution (more dots per square inch); can be either monochrome or color

mouse - box about the size of a cigarette pack used to move the **cursor** on the **monitor**; particularly useful with desktop publishing and graphics applications

operating system (OS) - set of programs resident in the computer that facilitate using the computer; typically controls the input/output functions such as managing the keyboard and the disk drives

output - information coming from the computer via a device such as a **CRT** or **printer**

peripheral device - a device which is accessory to the **CPU** and usually transfers information to and from the **CPU**; examples are **monitor, keyboard, disk drive,** and **printer**

plotter - a **peripheral** device which draws two-dimensional shapes (for instance, graphs, drawings) on paper; some use colors

printer - a **peripheral** device which accepts **output** data from the **CPU** and prints characters on paper (See: **daisy wheel printer, dot matrix printer, laser printer**)

program - a series of instructions to a computer which cause the computer to solve a problem or perform a task

RAM - an acronym for Random Access Memory; any memory which can be written on or read from by a **program** and in which the memory locations can be accessed in a random sequence; RAM is erased when the computer is turned off

ROM - an acronym for Read Only Memory; the integrated circuit on which data or instructions are permanently programmed into the computer at the time of manufacture

run - jargon for execute as in a program

scanner (digitizer) - device that allows input of a visual image (text, graphic, photograph) in digital form for use in a computer

scrolling - technique of displaying data on a **CRT** in which each line of data appears first at the bottom and moves upward as new lines are displayed

software - overall term for computer programs, those instructions written for a computer to follow in carrying out its various operations

storage capacity - the quantity of **bytes** a **storage device** can hold; usually expressed in **kilobytes (K)**

storage device - a **peripheral** device which holds information; includes **magnetic tapes** and **disks**

store - the process of transferring data onto some type of **storage device** so that it can be kept permanently

terminal - a **peripheral** device which facilitates human communication with a computer; usually consists of a **keyboard** and a **CRT**

DIRECT MAIL

Direct mail is defined as any marketing effort using the Postal Service or any other mail delivery service for distribution of the marketing message directly to a specified individual. In the case of your literacy programs, direct mail could range from a flyer sent to a small group of former clients informing them about a specific class to a brochure sent to the whole community detailing the seriousness of the literacy problem and the ways your agency is attacking the problem.

Direct mail can be a very effective way of reaching a selected audience. A database management system (as described in the previous section) can make the task of using this kind of marketing approach much simpler. Such a system might allow you to customize mailings to a variety of audiences that meet very specific criteria.

ADVANTAGES AND DISADVANTAGES OF MARKETING USING DIRECT MAIL

In trying to decide whether or not marketing by direct mail is a good idea for your agency, consider these advantages and disadvantages:

ADVANTAGES:

1. Direct mail is a very personal medium and an effective way to get your message across. The material arrives at the homes or offices of your intended audience (potential clients, community leaders, other community agencies, etc.) where it can be studied in private.
2. A successful direct marketing campaign can be an efficient use of your agency's time and money in bringing in new clients or getting out some specific message.
3. The results from direct mail are measurable. You can count the number of pieces sent out and the exact cost of any such mailing. If you organize properly, you will also have a fairly clear idea of those people who respond to the mailing by asking for more information, enrolling in a class, etc.
4. Direct mail can educate new and old constituencies about the services you offer.

DISADVANTAGES:

1. **Direct mail is an expensive form of communication, particularly when compared with newspaper, radio, and television advertising. Direct costs include printing and postage. Indirect costs include the time for staff to prepare and coordinate the mailings.**
2. **There is an element of risk in direct mail since you can estimate only roughly what the response will be.**
3. **By its nature, direct mail involves written material which may not be the most effective way to reach individuals with poor literacy skills.**

STEPS IN DIRECT MARKETING

Direct mail should not be a single event but rather a sustained effort throughout the year. The following steps outline procedures to follow in organizing a direct mail campaign:

Step 1. Identify your audience.

You may have different audiences for different mailings depending on their purposes. If you are trying to increase enrollment in a particular class, you would try to identify the people on your mailing list whose needs match that class. This might be a fairly small group. To increase enrollment in all your programs, you would send to a much larger list of potential clients. In trying to gain community support for literacy programs, you would probably do a mailing to as large a list as you could compile.

Step 2. Augment your initial mailing list.

Because of confidentiality issues, you probably will not be able to get whole lists from other sources. Therefore, you must figure out other ways to gather additional names. Any person who calls to inquire about your program, who enrolls in a class, or who expresses interest in any way should automatically go on your mailing list. Ask your current clients to suggest others who might need your service.

Step 3. Develop the mailing piece (or package).

Decide on the format for your mailing. The mailing "piece" can consist of any one or more of these parts:

a. <u>outside envelope</u> - sometimes includes a "teaser" (a slogan or quotation to compel people to open the envelope);

b. letter - can range from one to six pages although, in the case of mailings to potential literacy clients, there should not be too much written material

c. reply device - a card or other form on which the recipient of the mailing can respond (i.e., request further information, enroll in a class, etc.); this should fit into the return envelope

d. return envelope - may or may not include return postage

e. other literature - brochure, newsletter, schedule of classes, note from a satisfied client, etc.

In some circumstances, you may simply send a flyer with a coupon for responding. This may be put in an envelope or may be a self-mailer--a flyer with space for address label.

Each piece included in a direct mail package should perform a function related to the overall goal of leading the recipient to take some action. Regardless of the actual number of pieces in a package, the five steps illustrated in Figure 6 should be accomplished. Sometimes two or more steps are combined into one piece, or a single step is divided among several pieces.

It is wise to check with the post office to be sure that the mailing you are planning meets post office guidelines, particularly if you are doing anything unusual. (See pg. 59 for information on postal rates and regulations.)

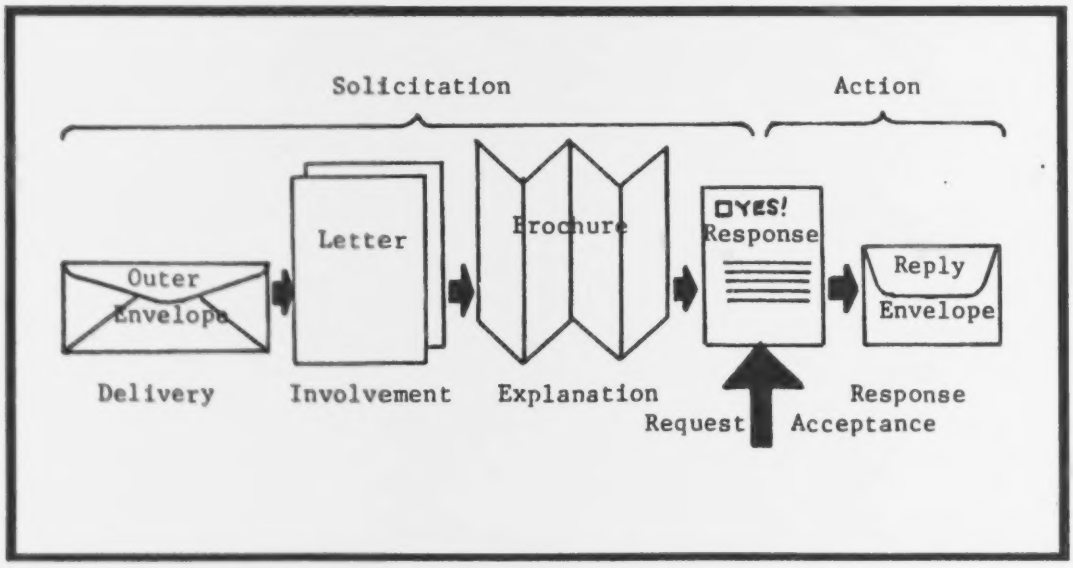


Figure 6. The role of each piece in a typical direct mail package

Step 4. Write copy for the mailing.

The copy for all parts of your mailing should be carefully planned. This is particularly important when mailing to potential clients. Remember that their literacy skills are limited and that the message must be presented clearly and simply.

Step 5. Design the mailing.

Some kind of artwork is desirable. At the very least, you should pay attention to the appearance of the letterhead and/or brochure and the type style of the letter.

Step 6. Arrange printing.

Once you decide what will be included in your mailing, you need to investigate the local options for printing. In getting a price, be sure that you have included such factors as perforations, folding, etc.

Step 7. Prepare the mailing.

If you are mailing more than 200 pieces and have a bulk mail permit, you can save money on mailing. Check with the post office to be sure that you know the requirements for bulk mailings. For instance, bulk mail requires that the mailing is organized by zip code. Using a database to generate labels in zip order will make this process easier. If you do not have the staff or volunteers to prepare the mailing, you might find either mailing houses or sheltered workshops to do this for you.

Step 8. Monitor returns to your mailing.

Be sure that you have included some method for keeping track of responses generated by this mailing. Some ways to to this:

a. use a special reply form
b. put a code on the reply form
c. include a special code in the return address
d. for all phone inquiries, ask where the person saw the information
e. for all enrollments, ask where the person saw the information

Any staff who deals with responses--opening mail, answering the phone, greeting drop-ins--should have clear and explicit instructions about how to record this information and why it is important.

Step 9. Assess the results.

Look at the number of responses in relation to the number of pieces mailed. If you were mailing information about a specific class, you will probably want to make a distinction between those who inquire about the class and those who actually enroll. Don't be discouraged if your first few efforts do not yield large numbers. A 10% response rate for a direct mail campaign is considered good. Remember that this is only one part of a whole marketing strategy, and you may not always know if an enrollment is the result of a specific mailing or the cumulative effect of several mailings or other marketing efforts.

Step 10. Schedule future mailings.

The timing of mailings depends on their purpose. If you are promoting a class or some other service with a specific starting time, you need to mail the materials enough ahead so people can plan their schedules and complete their enrollment. However, the mailing should not arrive so far ahead that people put the material aside and consequently forget to act on it.

WORKSHEET D

PLANNING A DIRECT MAIL CAMPAIGN

1. Have you used direct marketing in the past? ____Yes ____No

   If yes, when and to what audience? What results?

When	Audience	Results (Quantitative)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Have you identified your audience? ____Yes ____No

   Who are they? _____

   What do you know about them that would be useful in planning your direct marketing campaign?

   _____

   _____

3. Do you already have this audience on a mailing list? ____Yes ____No

   Approximately how many people? _____

   Do you have any other sources of names? ____Yes ____No

   If yes, what source? _____

4. What message do you want to convey? Or what action do you want from this audience?

   _____

   _____

5. How much money can you spend on this campaign? _____

How much staff time can you devote to this campaign? _____

6. Which of the following pieces will you include in this direct mail campaign?

____ Outside envelope	____ Letter
____ Reply device	____ Return envelope
____ Brochure	____ Newsletter
____ Schedule of classes	____ Self-mailer

7. Who will write the copy for the mailing? _____

8. Who will do the artwork for the mailing? _____

9. Where will you have it printed? _____

How many pieces will you have printed? _____

What is the estimated printing cost? _____

10. Who will prepare the mailing once the printing is completed? _____

_____

11. How will you monitor returns? _____

_____

TIPS FOR DIRECT MAIL*

Envelopes

1. Envelope mailings work better than self-mailers but are more expensive.

2. The best envelope is a #10 white or off-white envelope with printed return address.

3. Anything that looks like personal communication will increase the likelihood that the envelope will be opened. Some possibilities:

   - a window envelope that makes the letter look like an invoice
   - typed name and address (while this is more effective than a label, the extra cost may not be worth it)
   - postage stamp rather than meter-mark or preprinted indicia (again, a more expensive approach)

4. If you use a "teaser" (attention-getter) on the outside of the envelope, save postage and send the mailing by third class bulk mail.

5. If your material won't fit into a #10 envelope, use a 9" x 12" manilla envelope with a typed label.

Letters

6. Always use typewritten letters with a "ragged" right-hand margin. Do not use typeset or right-justified letters.

7. Use short paragraphs: 4-6 lines maximum and leave a blank line between each paragraph. Allow ample margins on all sides.

8. The preferred type is Pica; the smallest used should be Elite.

9. For general direct mail, studies have shown that long copy works better than short copy. However, keep in mind that, if your intended audience is potential literacy clients, you probably will want to keep any copy short.

10. With a two-page letters, the best format is printing on one side of separate sheets. However, with three or more pages, you can print on both sides.

11. There is evidence that most people read the first paragraph, then skip to the signature and the P.S. The most important point should be in the P.S.

12. Tests show that letters with photographs often produce very good results. This may be especially true for an audience with limited reading skills.

13. Be sure the letter describes the other pieces in the direct mail package and tells the reader what to do with them.

14. Don't feel compelled to use the standard 8 1/2" x 11" letter size. Often a smaller size letter will help differentiate it from other elements in the package.

Brochures and Self-Mailers

15. If the brochure is folded, organize it (lay it out) so that the headline is readable and clear when folded as well as unfolded.

16. Photographs improve brochures.

17. The use of two colors (black along with another color) suggests a more professional approach. The second color can be screened to provide even more variation.

18. If you use colored paper, black is probably the best choice for the copy. If you choose another color ink, be sure you know how that color ink will look on the colored paper.

18. If the brochure includes a reply coupon, be sure that your name, address, and phone are somewhere else on the brochure. Otherwise, if the person returns the coupon, they will not have any record of where to contact you.

19. Always use a preprinted indicia on a self-mailer.

Response Vehicles

20. Develop your response vehicle first, not last. Be sure what action you want the reader to take, and make it easy for them to take it. Many direct mail authorities feel that the response vehicle is the most important part of the package...and often the most poorly done.

21. Use warm earth and bold type.

22. Be sure there is some means to identify the response vehicle as having come from a particular mailing. This is the way you measure the effectiveness of the direct mail campaign.

23. If the response vehicle is part of a self-mailer, consider putting the address label right on the response vehicle or on the reverse side of it.

24. Build/maintain reader involvement by having them check boxes, fill in information, etc. Be sure the response vehicle starts with a reaffirmation of the benefit the person will obtain by responding. ("Please register me for...")

25. It is usually not wise to combine the response vehicle with the reply envelope.

26. Guaranteed return postage will increase the response rate. You will need to weigh the increased cost against the benefits, however.

General

27. Make each component different in size, shape, paper, color, etc., when folded and unfolded. Letter and outer envelope may match.

28. Avoid lightweight papers, flimsy, cheap-looking envelopes, and anything else that looks like "junk mail."

29. Check the insertability and handling of every component in your mailing before printing.

30. Be careful about printing in the area on any piece where the address label will be affixed. Heavy ink coverage sometimes prevents the label from sticking.

31. Use the "Address Correction Requested" service from the post office to clean up your mailing list. For mailings to home addresses, you can expect that 20-25% of those people will move each year. This figure may be even higher for the more transient populations who need literacy services. Perhaps 50% of those people will give the post office a forwarding address. Because bulk mail is only forwarded for 6 months and only if the person agrees to pay for each piece, it is a waste of money to mail to a list that is not as "clean" as possible.

TIPS FOR ARTWORK AND PRINTING*

1. Pay attention to the printed material you see every day. Save examples of those you like or can use. (Of course, you should not take artwork from another source without permission.)

2. Use screens to make one color look like several. This can add a very professional appearance with little or no additional cost over one color.

3. Not every color screens well. Basic blues, greens, yellows, and black usually work well while many reds may produce unusual and unappealing shades when screened.

4. Always use serif type for easy readability.

5. Avoid reverse-outs for copy. It may be OK for major headings, but is harder to read for text.

6. Have two competent people proofread every word of everything that is printed. One method is to have one read the original while the other reads along on the piece. Encourage them to challenge anything that "doesn't look right."

7. Make sure the artwork is right before it goes to the printer. Otherwise it could be very expensive to make changes.

8. Get your artwork back from the printer promptly and inspect it for damage (for which the printer is liable). Find a secure storage area for artwork.

9. Consider carefully the weight, color, finish, grade, and availability of the paper you specify. Your printer may be able to recommend an alternative paper which could significantly reduce the cost.

10. Changing the finished size of your printed pieces can result in dramatic savings, if it allows a printer to use a lower-cost press or one with less wasted paper.

11. A middle ground on quality is usually best. Cheap-looking materials kill results, while top quality is too expensive and isn't noticed by enough people to improve results very much.

12. Two-color is usually the best choice. A single color, even on colored paper, often looks cheap while three or more colors are usually too expensive.

13. A common rule of thumb is that one-half the cost of a printing job is the paper and the other half is all the rest.

POSTAL RATES AND REGULATIONS

There are five classes of U.S. postage of interest to those doing direct mail:

Express mail

Priority mail

First class

Third class

Third class bulk

The decision as to which to use depends on these factors:

1. Cost

   Express mail - starts at $10.75 for any piece up to 2 pounds
   Priority mail - $2.40 to $72.40 depending on the weight and zone to which it is mailed
   First class letters - 22 cents for first ounce; 17 cents for each additional ounce (maximum 12 ounces)
   First class postcard - 14 cents
   Third class - 22 cents for first ounce; 17 cents for each additional ounce to 4 ounces; then 17 cents for each additional 2 ounces (maximum 16 ounces)
   Third class bulk - regular: 8.3 cents to 12.5 cents
   nonprofit organizations: 3.4 cents to 6.0 cents

2. Speed of delivery

   Express mail - next day delivery guaranteed
   Priority mail - usually next day delivery
   First class - one day to one week delivery
   Third class - generally one week to three weeks delivery

3. **Timing control** - This is related to speed of delivery. There are some experts who say that mail received on Tuesday and Wednesday does 5% - 15% better than mail received on any other day.

4. **Perceived importance** - Depending on the circumstances, this refers to the importance of the piece of mail as seen by the recipient, their family, the secretary, the mail room, etc. An actual stamp may be perceived as being more personal than a meter mark. For business mail using a meter mark, there is very little to distinguish first class from third class bulk.

5. Forwarding - Mail sent first class, priority or express will be forwarded for one year after an address change is filed. (Of course, it is the recipient's responsiblity to file this change with the post office.) For mailings to lists where many addresses may have changed, first class may make more sense than third class bulk which won't be forwarded. (For both third class and first class, the post office provides an address correction service at 22 cents per piece. However, with third class they return the piece to you without forwarding it.)

6. Package weight - Because third class bulk mail permits up to 4 ounces for the basic rate, the difference between first and third class can be appreciable for packages weighing more than 1 ounce.

Express Mail - up to 70 pounds
Priority - 12 ounces to 70 pounds
First class - up to 12 ounces
Third class - up to 16 ounces

7. Content uniformity - To be eligible for third class bulk mail, the pieces have to all be identical outside and inside, with no personalization other than that necessary for mailing. This rules out third class for personalized correspondence.

8. Zip code availability/sequencing - Third class bulk mail requires than each address includes a zip code and that all pieces be in zip code sequence.

9. Quantity mailed - You must have a minimum of 200 pieces, or 50 lbs., at one time in order to use bulk mail.

10. Package size -

Express mail - up to 108 inches in combined length and girth
First class postcards - no smaller than 3 1/2 x 5 inches; no larger than 4 1/4 x 6 inches; thickness no less than 0.007 inch

GLOSSARY - DIRECT MAIL AND PRINTING

address correction requested - an endorsement which, when printed in the upper left-hand corner of the address portion of the mailing piece (below the return address), authorizes the Postal Service, for a fee, to provide the new address of a person no longer at the address on the mailing piece.

artboard - posterboard on which copy, graphics and printing instructions are positioned for photography in order to create a negative; also called camera-ready art

bleed - an extra amount of printed image which extends beyond the trim edge of a page

blue line - a trial sheet of printed material (made by creating a positive print of the negative from which the printing plate will be made), used for approval and/or correction before the actual printing is done

brochure - a pamphlet folded and/or bound in booklet form; often accompanied by a letter when used to advertise a product or service

business reply - the postal classification which enables mail pieces to be returned to the sender at no charge to the recipient; Business Reply cards and envelopes are often abbreviated BRC and BRE, respectively

carrier route sort - refers to mail pieces sorted and bundled by the mailer in a manner specified by the Post Office to facilitate delivery by a postal carrier, in the exact order in which he/she actually delivers mail on his/her route; a permit is required to mail by this classification

camera-ready art (SEE: **artboard**)

catalog - a pamphlet or book that systematically lists items or programs with descriptive details

cheshire - denotes various aspects of the process wherein names and addresses printed on specially prepared tractor-fed paper are cut, glued and mechanically affixed to an envelope or mailing piece one at a time

clean list - a list that has been updated or corrected and is current

copy - any material that is to be used in the production of printing, but most commonly refers to the text

decoy names - a means of controlling the security of a mail list by inserting unique names into the list, or by using known recipients to monitor mail from a given list; also called salting the list

direct mail - any promotional effort using the Postal Service or any other mail delivery service for distribution of the advertising message directly to a specified individual

direct marketing - any communication which is intended to produce a specific action (an order, an enrollment) without a face-to-face meeting

direct response - refers to the active interest in a product or service that has been generated by advertising through any means and evidenced by the consumer's communication or other action

drop out - the portions of an **artboard** not meant to be reproduced, often represented by a **mask**

dummy - a preliminary layout of the piece to be reproduced, showing positions of the text and illustrations, as they are to appear in the final rendition; also called a mock-up

duplicates - names that appear two or more times on one list (internal duplicates), or on several lists (duplicates between lists)

duplicate elimination - part of the **purging** process which involves deleting all but one **duplicate** name

envelope - a flat, usually paper container completely enclosing a letter or other piece of mail; standard sized envelopes are frequently denoted by number (for instance, #10 = 4 1/8" x 9 1/2")

Express Mail - a USPS system that provides delivery of letters or small parcels the following day; similar overnight delivery services are offered by private companies under different names (for instance, United Parcel Service, Federal Express, Emory)

flat - the assembled composite of negatives from which a printing plate is made

four color - term for full color printed matter produced by **process printing**

four-page - a form of printing in which a sheet of paper, printed on both sides, is folded to produce a booklet of four pages, consisting of a front cover, two inside pages, and a back cover; Most booklets, catalogs, etc. involve four-page multiples.

fourth class mail - parcel post weighing more than 1 pound

graphics - relating to or involving the art of design, printing and reproduction

halftone - a printed picture that has been broken down into a pattern of dots; used to create shadings of tone between black and white

indicia - the postal markings imprinted on mail, or on labels to be affixed to mail pieces

label - the portion of a mail piece identifying the recipient and containing address and/or coding information

line art - in the graphic arts usage, refers to any negative, print, copy, or printing plate which is composed of solid image areas without **halftone** patterns

list cleaning - the process of correcting and/or removing a name and address from a mailing list because it is no longer correct

list maintenance - any manual or mechanical system for keeping names and addresses, phone numbers and other information current (SEE ALSO: **list cleaning**)

mail classification - refers to the regulations, specifications, mode of payment for postage and the type of service associated with categories of mail established by the USPS

mail house - a facility which handles printed material to be mailed. Typically is responsible for affixing labels; inserting material into envelopes; sorting, bundling and bagging the material according to postal regulations; and delivering the bags according to Post Office for acceptance and distribution by mail.

mail list - a compilation of names and addresses; may be furnished on plates, in printed form for affixing, or on magnetic tape for computer processing; printed labels may be printed on performated, gummed stock to be moistened and affixed, on pressure-sensitive stock which adheres itself, or on plain paper which is cut, glue-applied and affixed by the Cheshire or similar process

maintenance (SEE: **list maintenance**)

mask - an opaque film material used on selected areas of the **artboard** while shooting the negative in **offset** printing

mechanical - a page or layout prepared as an original for photographic reproduction

merge/purge - any system used to remove duplicate names or outdated material from among two or more source files and to produce a single unduplicted file in some desired sequence

meter - to print postal **indicia** on a mailing piece by means of a postage meter

meter mark - the printed mark which indicates postage on an envelope; used instead of a postage stamp

NFA - abbreviation for No Forwarding Address; used on mail that has been returned to the sender due to an obsolete address

nixies - pieces of mail that are undeliverable for any reason; only automatically returned to sender for first class mail, but similar services may be obtained for other classes of mail by payment of certain charges

offset - a printing process in which an inked impression from a plate is first made on a rubber-blanketed cylinder and then transferred to the paper being printed; often used to print from typewritten copy in order to avoid the cost of typesetting (also called planographic or lithographic printing)

package - the collection of materials received by the addressee; for example, a "letter, brochure and labeled business reply card in a No. 10 window envelope sent by third class bulk mail"

permit - consent purchased on a regular basis from the USPS allowing mail to be sent by a certain classification

postal card - two-sided piece of mail which according to USPS regulations, may not be larger than 4 1/2" x 6" nor smaller than 3 1/2" x 5" and must be of uniform thickness not less than .007".

pressure sensitive label - a label which may be peeled from its backing and affixed; may be used to affix the label for the outgoing mailing (usually done manually), or the label and its backing may be affixed to the outgoing mail so the responder can peel off and affix the same label to the response vehicle

printed matter - material printed by any of various prcesses that is eligible for mailing at a special rate

process printing - a method of printing in which the three primary process colors (red, yellow and blue) are superimposed on one another, along with black, to form varying shades of all colors; the full-color original is "separated" by optical scanning equipment, producing four separate printing plates; the printed image is then obtained by adding each color in a separate run through a two-color press or in the separate press stations in a four-color press

purging - the process of eliminating duplicates and other undesirable records from a file

reply card - the **response vehicle**, usually mailed as part of the promotional material, which the recipient can return to the sender to indicate interest in the product or service being offered; often use **business reply** permits so the responder does not need to affix postage

response vehicle - the portion of a direct marketing piece that asks for the desired action and facilitates the responder doing so

return postage guaranteed - an endorsement often printed on mailing pieces to ensure that the merchandise or other material, should it be undeliverable, will be returned to the sender at the sender's expense

SCF - abbreviation for Sectional Center Factor, a USPS distribution unit comprised of Post Offices whose zip codes start with the same first three digits; generally will indicate a specific mailing region

screen - term used to refer to the density of dots constituting printing; the separation of these dots determines the shades of color produced

second class mail - newspapers and periodicals with second-class mail privileges

self-mailer - a folder which can be sent by mail without enclosure in an envelope

sequence - the order in which names appear in a list; while most lists are in zip code sequence, some are alphabetical by name within zip code, in carrier sequence, etc.

sort-tie-bag - the process used in handling printed material to be mailed; in sorting, the mail is separated as required by applicable postal regulations; in tying, the mail is bundled by mail classification codes; in bagging, the mail is placed into mail bags that indicate the SCF to which it will be mailed

third class bulk mail - the least expensive class of U.S. mail; to be eligible, mail must meet certain requirements (for instance, no personal letters or bills), have a minimum number of identical pieces, be entirely in zip code sequence, and be sorted, prepared, tied, and bagged by the mailer in accordance with USPS regulations

third class mail - circulars, books, catalogs, and other printed matter; merchandise, seeds, cuttings, bulbs, roots, scions, and plants weighing less than 16 ounces

two-color - commonly used to refer to printed matter consisting of only two colors, different shades of which are created by the use of screens

typeset - the process of creating, mechanically or photographically, computer-generated characters in a specific size and style ready for later stages in the reproduction process

USPS - abbreviation for United States Postal Service, a government office responsible for the handling and delivery of mail

window envelope - a type of envelope with a portion die-cut out of the paper through which a name and/or address can be seen; window may be open or covered with transparent material affixed to the inside

zip code - abbreviation for Zone Improvement Plan; a group of five digits assigned by the USPS to designate each postal delivery area in the U.S.

zip plus four - four digits added to a zip code which more precisely pinpoint the area where mail is to be delivered within a zip code region

III. MARKETING TO OTHER AGENCIES

WORKSHEET E

MARKETING TO OTHER AGENCIES *

OBJECTIVE: *To develop a priority list of agencies to be used as potential targets of a marketing campaign to increase awareness of your services and to increase their referrals to your programs.*

Categories	Names of Agencies	What Audience(s) Do They Reach
1st Circle **TRUE BELIEVERS** Your most likely sources of referrals; agencies that provide other services for the same constituencies		
2nd Circle **SUPPORTERS** Other likely sources of referrals; agencies with which you have worked in the past		
3rd Circle **SYMPATHIZERS** Prospective supporters; possible sources of referrals; agencies with which you have had limited or no contact in the past		
4th Circle **WILD CARDS, UNKNOWNS** Other agencies whose response is unknown		

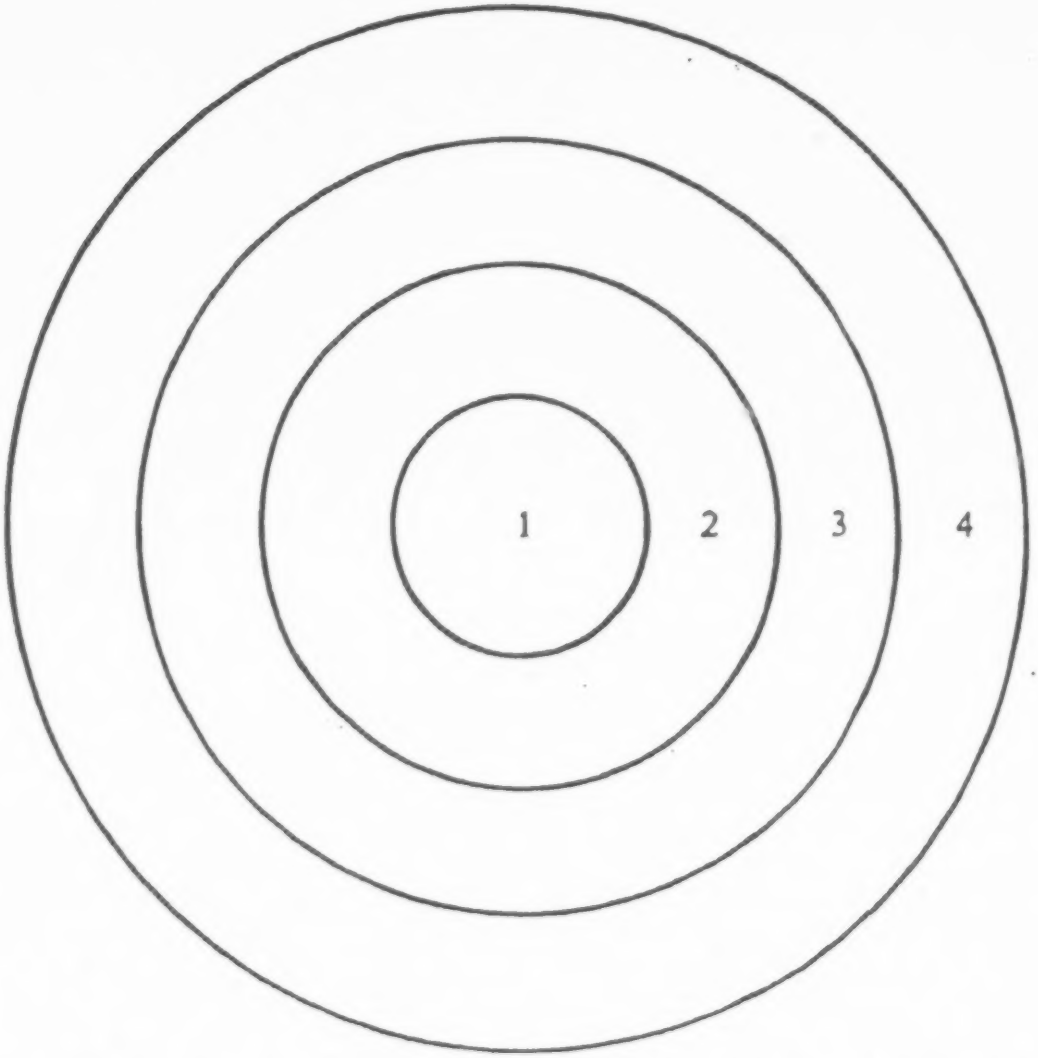
* based on Michael Seltzer, *Securing Your Organization's Future*

WORKSHEET F

IDENTIFYING YOUR TARGETS *

OBJECTIVE: *To identify those agencies which are prime targets for a marketing campaign.*

DIRECTIONS: List 3-5 agencies in the inner 3 circles which you might target in a marketing campaign.



* based on Michael Seltzer, *Securing Your Organization's Future: A Complete Guide to Fundraising Strategies*

OTHER AGENCIES - SAMPLE LIST

The following list includes some of the agencies which might be considered prime targets for your marketing campaign.

- Adult basic education programs
- Literacy Volunteers programs
- Programs for Women, Infants & Children (WIC)
- Health clinics
- Head Start sites
- Family-operated day care
- Hospitals
- Nursing homes
- Catholic Charities
- Department of Social Services
- Families in Crisis Programs
- Visiting Nurse Association
- Family Court
- Probation intake
- Correctional facilities
- Religious groups
- Public housing
- Domestic violence shelters
- Cooperative Extension offices
- Bodegas (Hispanic grocery stores)
- Other ethnic grocery stores
- Community centers
- Public libraries
- BOCES/continuing education programs
- Community colleges
- Food pantries
- Food stamp sites
- Check cashing sites
- OTB
- Family service agencies
- Radio and television public service announcements
- Unions
- Local businessmen (employers)

ROLE PLAY - MARKETING TO DSS

SITUATION

Representatives of the Central Valley Literacy Project have asked to meet with representatives of the Branford County Department of Social Services to talk about ways the two might cooperate to get more people into the literacy services they need.

ROLES

1 - Jennifer Morgan--Director of Central Valley Literacy Project

You have been on the job for about six months, and you have made increased enrollment one of your highest priorities. You and your staff have done some thinking about how this might be done. You have decided that one strategy you will use is a marketing campaign to other agencies who work with clients who might need your services. You have identified the County Department of Social Services as one of the prime targets for this campaign. At other times that you have talked with Department Director Michael Soltzman, you have gotten the impression that he is not particularly anxious to cooperate. However, you feel optimistic that you can present a strong enough case to win him over. For one thing, you suspect that his attitude stems from bad experiences with the former director. You have asked him and some of his key staff to meet with you and several of your staff to make an initial presentation.

2 - Darnell Johnson--Assistant Director, Central Valley Literacy Project

You know that Jennifer is very excited about this new marketing push. However, you have grave doubts about whether it is going to be worth all the trouble. For one thing, because your wife Belinda is a social worker at DSS, you know how overloaded those folks are already. They will have a hard time seeing referrals to literacy programs as a priority. Even though you have tried to convince Belinda otherwise, you know that most people at DSS have a fairly negative view of the Literacy Project.

3 - Maria Sanchez--Literacy Teacher, Central Valley Literacy Project

Jennifer has asked you to attend this meeting with DSS as a representative of the teachers in the project. You want to talk about the progress that many of your clients are making. You also want to emphasize what you hear from so many of the clients--that they wished they had heard about the program a lot sooner. Why didn't one of the other agencies with which they deal tell them about the Literacy Project?

4 - Michael Soltzman--Director, Branford County Department of Social Services

You were not particularly anxious to have this meeting with the people from the Literacy Project. You have never been impressed with the quality of their program, and your dealings with the last director were quite hostile. However, your boss encouraged you to at least meet with them and give the appearance of trying to cooperate. You don't think he cares whether you actually cooperate in any meaningful way. On the other hand, you have met the new director Jennifer and she seems like someone you could work with.

5 - Bonnie Darter--Head of Case Management, Branford County Department of Social Services

Your social workers frequently tell you about clients who have all sorts of difficulties because they can't read or write. You know that it would be a real service to these people to get them into literacy programs. However, your staff is already so overloaded with all the demands upon them that you would really hate to add any more burdens. You know how these things go--you agree to cooperate with another agency and soon you find yourself filling out all sorts of paperwork and taking all sorts of time that you can't afford to lose.

6 - Bob Gilford--Assistant Director, Branford County Department of Social Services

These literacy programs are a waste of time. You sent a client to one 6 years ago when you were a social worker and that client quit after the second week. He told you that the teacher treated him like he was some sort of idiot. You are definitely against DSS getting involved in any referrals to any such programs.

IV. RETENTION

COMMITMENT AND RETENTION

RETENTION of adult literacy students involves a commitment to the program and continuation in that program through realization of the student's goals and objectives.

In a June, 1987 report prepared for the New York City Literacy Assistance Center, the section on attendance and drop-out rates was introduced as follows:

> "Probably the most difficult decision made by these adult learners was the one to show up for the first session...Many researchers have pointed to the crucial nature of the initial meeting in determining whether or not participation will be continued."

Once the adult learner makes it past that first session, what factors, **personal and inherent in the program**, have the most significant effect on retention of that learner in your program?

MAJOR FACTORS POSITIVELY AFFECTING ATTENDANCE

- Family Support
- Perceived Progress
- Heightened Self-esteem
- "Good" Teacher

MAJOR FACTORS NEGATIVELY AFFECTING ATTENDANCE

- Lack of Support Systems
- No Tangible Measures of Progress
- Insensitive, Non-nurturing Learning Environment
- Incompetent/Inappropriate Instruction

SYNECTICS *

Synectics is an approach to creative group problem solving which involves two basic activities. First, the problem under consideration is pulled apart, analyzed, and mulled over to "make the strange familiar." Second, an effort is made to take a new view of the old situation by "making the familiar strange."

The specific steps:

1. PROBLEM STATEMENT

The problem is explained in as much detail as possible. When this is a group problem, the explanation is often done by the person in the group who is most familiar with the problem. The problem may also be brought by an individual who is asking the group for help in its solution. A general statement of the problem is developed.

2. GOAL WRITING

Each member of the group is asked to state a goal for the problem solving. This takes the form of an "I wish..." statement. The group (or individual) then picks one which seems most promising.

Example: I wish we could increase the percentage of adult students who finish a course to at least 75%.

3. EXCURSION

Participants are asked to set aside the immediate problem and to generate ideas or images in an area not directly related to the problem. This involves playing with an analogy in order to come to a better understanding of the original problem.

Example: Try to think of images of growth or increase in politics or in the forest.

*based on film Problem-Solving: The Synectics Approach

4. FORCE-FIT

The group picks one of the above ideas or images which has strong appeal. The group then makes a list of ideas relating that idea/image to the original problem. The group picks one (or a combination) of these ideas which seems to hold the most promise.

5. ITEMIZED RESPONSE

The group articulates the good parts of the selected idea as well as any concerns about the selected idea. Participants are then asked to suggest ways to address those concerns.

6. POSSIBLE SOLUTION

The group makes a commitment to this possible solution.

7. NEXT STEPS

The group plans what steps will be taken to carry out this solut

V. MARKETING CASE STUDIES

MARKETING CASE STUDIES

CASE STUDY 1

Joe, who just turned 30, has felt very limited in his job prospects because he cannot read. He does not want to spend his life working in the car wash. At the local supermarket, he saw a poster about a literacy program at the Calhoun County Public Library. His wife Cindy knew how discouraged he had become about looking for a better job, so she encouraged him to go talk to them. Although he was embarrassed to tell anyone that he couldn't read, he decided that he should check it out. Carlotta Perez-Spencer, the woman he talked with at the library, was very helpful and encouraging. She said he would be hearing from them in a week or two. Joe began to feel cautiously enthusiastic about getting started in a class. For the first week he checked the mail every day to see if anything had arrived. It is now a month later and he hasn't heard anything. When Cindy asks him about the class, he says that he has changed his mind about attending.

CASE STUDY 2

The literacy class meeting during the day at the local high school started out with 8 adults. Because the school is so crowded, the class had to meet on the stage of the auditorium. The acoustics and lighting there are very poor. The auditorium seems to be a hangout for the high school students who aren't in class for that period, so there is a lot of distracting noise. Nevertheless, Ms. Canton is an enthusiastic, caring teacher who is determined to carry on in spite of obstacles. As the weeks go by, however, the class dwindles to 2 or 3 students and even they grumble a lot about the conditions.

CASE STUDY 3

About 3 months ago, the Welltonville Literacy Project spent a great deal of time and money developing a three-fold brochure which describes the literacy program in great detail. It includes a letter from the mayor and quotes from various civic and business leaders on the importance of literacy. The goal of the brochure was to increase enrollment in the literacy programs offered by the Project. However, there has been almost no change in the number of people enrolled.

CASE STUDY 4

The offices of the Tucker County Literacy Program are housed in the Community Center where Bonita Hargrove plays bridge with other senior citizens once a week. Bonita has seen a poster there and thinks it would be wonderful to be able to read well enough to take her turn reading the scripture at her church. She has always used an excuse about being too shy to speak in public, not wanting to admit to her friends that she really doesn't know how to read. She decides to talk with George Bonfleur, the Project Director, about enrolling in a class. She finds that she must make an appointment through the center receptionist, Toni Petersen. She is careful to set a time when her friends are not likely to be in the center. The appointment goes very well, and George seems to understand that she would want to keep this a secret. However, when she comes to bridge the next week, her friend Sarah Turner says, "Bonita, Toni says you are going to take a class to learn to read. How can you not know how to read?"

CASE STUDY 5

Barbara Davis has been an enthusiastic student in Bob Brown's literacy class. This is the second series of classes she has attended without missing a single session. She is making very good progress, and seems to be very proud of what she has accomplished. She confided to Bob once that her goal is to get off welfare so her children will have a better life than she has had. Then she started missing class frequently. When Bob asked her about this, she was very apologetic but vague about her reasons. He is very puzzled but doesn't want to pry into her personal life. Eventually, she quits coming altogether.

CASE STUDY 6

Juan Cortez has recently moved from one part of the city to another. In the old neighborhood, he had been working with a literacy tutor through a program located in his church and sponsored by another community agency. He found the work hard, but he also felt good about his progress. There had been a fairly dramatic improvement in his scores from the test he took when he first applied for the program and that he took a month ago after his first year in the program. These tests were very nerve- wracking for him, but he understood that they were a good way for him and his tutor to know how he was doing. Now he has tried to find a program in his new neighborhood and they tell him that he must first take a test to determine his reading level. He tells them that he has just taken a test at his old program, but they say that they can't get those scores. Juan doesn't want to take another test so soon. He is pretty busy just now, so he decides to forget about the new program.

VI. PLANNING YOUR MARKETING STRATEGY

WORKSHEET G

PLANNING A MARKETING STRATEGY

PRELIMINARY ANALYSIS

- What Market Segment do you want to reach?_____

_____

- What will be your Marketing Campaign Theme?_____

_____

- What Objectives (measurable results) do you hope to achieve?

1._____

_____

2._____

_____

3._____

_____

4._____

_____

- What Image do you want to convey about your program? _____

_____

DEVELOPING LIST OF POTENTIAL STRATEGIES

- What Promotional Strategies might you use to achieve these Objectives?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Many of these Promotional Strategies may be useful. Pick one for further planning.

IMPLEMENTATION OF MARKETING STRATEGY

- Strategy: _____

- What Activities will be needed to carry out this strategy? An activity is:
  a. a specific procedure or process
  b. completed at a certain point in time
  c. that is carried out by organization personnel or supporters
  d. as part of a strategy
  e. for reaching the desired objective

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

- Prepare a Timeline for implementing these activities.

Activities	Intermediate Dates	Target Date
1.		
2.		
3.		
4.		
5.		
6.		

- Assign Responsibility for implementation of these activities

Activities	Resources (Budget)	Person(s) Responsible	Completion Date
1.			
2.			
3.			
4.			
5.			
6.			

EVALUATION

- How will the activity be Evaluated? _____

_____

_____

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MARKETING II

WORKSHOP EVALUATION

Participant (Optional):_____

Affiliation:_____

PART ONE

Please complete the following set of questions by circling the appropriate number.

Key: 1 - I knew about this before I cam to training.
2 - I understand this now and will be able to use what I have learned.
3 - I still don't understand this.

After training I can make the following statements about the training objectives listed below. I am able to:

1. Explain the basic concepts of marketing, including the distinction between marketing and promotion.	1	2	3
2. Plan a simple video production for use in marketing.	1	2	3
3. List several ways that the computer might be used in marketing.	1	2	3
4. List the general principles that might be used in planning a direct mail marketing campaign.	1	2	3
5. Identify those other agencies which should be the primary targets of marketing about literacy programs and the strategies which would be most effective in reaching those agencies.	1	2	3
6. List several steps that might be taken to increase retention of clients in literacy programs.	1	2	3

PART TWO

Please complete the following statements:

This course met and/or did not meet my expectations because:

I think that the course content was relevant and/or irrelevant to my work because:

I think that the course materials were:

I think the workshop setting was:

In my opinion the level of interaction in the group was:

I would like to tell the workshop leaders that:

My overall opinion of the course was:

WORKSHEET C

YOUR DATABASE STRUCTURE

FIELD NAME	CONTENT	FIELD LENGTH	FIELD TYPE TYPE (C/N/L)*

* C = CHARACTER
N = NUMERIC
L = LOGICAL